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School of Business Administration

BUSINESS STRATEGY | BA 495 | University Studies Senior Capstone Course

**Professor** **Theodore A. Khoury, PhD.**

**Office**: SBA Room 660 **Office hours:** Email for appointment to meet on during Tuesdays noon -4pm on this site: <https://plus.google.com/hangouts/_/pdx.edu/ba495-khoury>

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**My Website:** **<http://www.pdx.edu/sba/fp-theodore-khoury>**

**Course Research Website: <http://guides.library.pdx.edu/ba495?hs=a>**

**Bio:** Theodore A. Khoury (Ph.D., University of Texas at Dallas) is an Associate Professor of Management and Strategy at Portland State University and teaches the senior capstone strategic management course His research focuses on the role of institutions and social forces within entrepreneurship and innovation processes. Within these domains he explores how both formal (i.e. reforms; legal and political systems) and informal (i.e. social, cultural) institutions enable or constrain the pursuits of entrepreneurial actors within developing countries and emerging industries. He holds a PhD in International Management Studies from the University of Texas at Dallas, a B.S.E. from the University of Michigan and an M.S.E. from the University of Texas at Austin, both in mechanical engineering, and an M.B.A. from the University of Illinois at Chicago. Prior to pursuing his doctorate in organizational studies, he worked for over 12 years in the area of micro-nanotechnology in various senior management and consulting roles related to research and innovation strategies and is the inventor of 42 U.S. patents and over 70 patents issued in other countries. He is on the board of advisors for the Oregon Translational Research and Development Institute’s (OTRADI) Oregon Bioscience Incubator (Portland, OR), Womenpreneur (Brussels, Belgium), and is a former board member of the Community Music Center, Inc (Portland, OR).

**COURSE DESCRIPTION**

<http://capstone.unst.pdx.edu/courses/business-strategy-ba-495-for-sba-majors>

SBA 495 is PSU's largest Capstone and engages over 750 students in 35 sections of a business strategy course that works with an organization in the community to address real world business challenges. In this Capstone students learn to systematically analyze a firm’s internal and external environments and, through engagement with community partners, apply concepts and theories related to the formulation and implementation of business/organization strategies. Students join an interdisciplinary team; pool their knowledge, skills, and interests; and use strategy to address a problem or concern of the community partner. Emphasis on multiple functions and perspectives to understand diverse management and stakeholder interpretations, conceive integrative solutions, and address social and organizational outcomes.

**COURSE LEARNING OBJECTIVES**

In this course, we will utilize business strategy frameworks to research and analyze the client’s strategic issues and formulate recommendations. The strategy content and the client project have been selected so our students can experience the key goals of the University Studies Program (**appreciation of the diversity of the human experience, communication, critical thinking, and social/ethical responsibility)** while making community impact.

**6 Primary Learning Goals of the Business Strategy Capstone Course**

1. **Recognize** and understand how to apply the major concepts, frameworks, and vocabulary of strategy theories

2. **Relate** strategy concepts to how they can be applied to make a difference in the community

3. **Explore** how human diversity is meaningful to understanding and solving strategy problems

4. **Assess** how strategy interfaces with social and ethical responsibilities

5. **Manage** effective collaboration and communication to solve strategy problems

6. **Develop** your critical thinking skills in solving strategy problems

**Capstone Student Handbook:** Review carefully! [www.pdx.edu/sites/www.pdx.edu.cae/files/capst-stu-bk05.pdf](http://www.pdx.edu/sites/www.pdx.edu.cae/files/capst-stu-bk05.pdf)

Effective strategies lead organizations to stand out—for **what** they do and **how** they do it. One of the primary pillars of PSU’s strategic focus is to develop students who can apply interdisciplinary learning to real world issues and become leaders of change to better serve their communities. This capstone has been a key component of PSU’s international recognition for a distinguished undergraduate experience, as noted by our strong rankings <http://www.pdx.edu/insidepsu/rankings-recognize-psus-rise>

**REQUIRED READING**

* Capstone Strategic Management ISBN# 9781308347288 as a softcover book available at the PSU books store or ISBN# 9781308356211 as a color e-Book per the links below.
  + - [Purchasing a book with an access code - PDF](http://create.mheducation.com/shopresources/pdfs/eBookstore_instructions_access_code.pdf)  <http://create.mcgraw-hill.com/shop/>
  + - [Purchasing a book using a credit card - PDF](http://create.mheducation.com/shopresources/pdfs/eBookstore_instructions.pdf)  <http://create.mcgraw-hill.com/shop/>
* Or, you can buy ***Frank T. Rothaermel, Strategic Management: Concepts.*** *2nd ed. (ISBN-13: 978-0077645069*
* Using the 1st ed. of Rothaermel’s book (*ISBN-13 9780077324452)* may work out just fine since the concepts are the same, but the illustrations discussed (which are sometimes discussed in class) may not be the same.
* Case (login at WDI needs to be created in order to check out); $3.95 for case: <http://wdi-publishing.com/casedetail.aspx?cid=1429425>
* Other assigned readings not included in the textbook will be posted on D2L.

**COURSE REQUIREMENTS, ASSIGNMENTS & GRADING**

Your grade in this course is based on both group and individual work, where group assignments are reflected in your capstone project work (presentations, final paper) and your individual work is comprised of quizzes, reflective journal entries, and participation.

# DETAILS ON INDIVIDUAL ASSIGNMENTS: TESTS, REFELCTIVE JOURNAL ENTRIES

**1. QUIZZES** are based on (1) Reading assignments predominantly (book reading and special topic articles) and (2) lectures (i.e. video lectures and slide material). These are short, timed quizzes of 7 questions in multiple choice and T/F format to ensure that the strategy vocabulary and their applications are understood. The average time per question should be about 2 minutes, with total quiz time at 15 minutes. You may use your notes and book (but quizzes must be taken by you and without the help of others).  **If you miss the window to take the quiz, you will not have the option to take it again;** these are lost points, so do set aside appropriate time. Out of these quizzes, the lowest score is dropped before determining final grades.

**2. REFLECTIVE JOURNAL ENTRIES** are **handed in electronically only** **via the ‘dropbox’ on D2L**. Please note, they are not accepted after the due date. These assignments are central to the University Studies Capstone Program courses and allow students to apply strategy concepts to real-world situations as seen from your perspective and the view of others. Point-scoring for these are as follows:

Effort/Ideas lacking= 1-3 Superficial ideas, ok editing= 4 Good ideas/ok editing= 5-6 Good ideas/perfect editing = 7

*Entry Format:* Typed, heading of the assignment centered at top, 11-point font, Times New Roman, single-spaced.

*ENTRY 1: Diversity/ Critical thinking — “Reflection on diversity within your client’s project and its community impact” (1-1.5pg length)*

* Consider your client’s project and discuss the stakeholders that the project COULD serve if successful.
* Consider the specific ways that diversity can be defined (i.e. according to different dimensions such as stakeholder-, ethnic-, socioeconomic-, cultural-, age-, functional-based, etc.) and how this impacts how the project could serve one or more communities.
* How does it serve a diverse set of actors? Whom will it serve and whom will it not serve if successful?
* What are the biggest challenges that you face in supporting both the client and your group to help the project succeed (and serve its purpose)?
* What do you see as potential outcomes from your interaction with the client project (client and group) in terms of your own growth both professionally and personally with regard to diversity?

|  |
| --- |
| *ENTRY 2: Diversity — “Jackson Pollock Case” (1-1.5pg length)* Answer the following questions:   * Consider the characters in the case to understand how the perceived value of the artwork is contingent on the identity of the stakeholders involved with reconciling value. Analyze three stakeholders (i.e. character names or institutions, besides Teri) that matter to determining the value of the painting and how they shape or shaped the value in the case. What is the power differential between these stakeholders and Teri? * Discuss what definitions(s) of value—anticipated, perceived, or absolute (real/stand-alone) that were animated in this story and where in the film it becomes evident that value is judged this way. * Describe specifically the kinds of utilized or (un-utilized) attributes of Teri Horton that challenge her cause to authenticating the artwork and establishing fair market value? Do you see this case as a situation of social justice/injustice? Why or why not? * Putting yourself in Teri Horton’s position, describe the strategic actions or alliances you would recommend she pursue to change the value of the work and why these actions/alliances.   *ENTRY 3: Ethical / Social Responsibility— “Reflect on your opportunity to champion a cause” (1-1.5pg length).*   * Per the Grameen Intel Case: Think about Huque’s story and consider your own story at this point of your life. Discuss key factors in your upbringing or education, family, or cultural experiences where you were exposed to values, causes or situations that stuck with you, helped define you as a person, or affected how you make key life decisions. * Identify a cause or problem that you feel well equipped, passionate and/or motivated to support. What is the backstory on your interest in this cause? * Identify the steps, key events, and routes in your life that would allow you to get involved with this cause. Does it require achieving specific milestones (i.e. job/career related, personal wealth, family situation, or education)?   *ENTRY 4: Writing /Communication—“Reflect on your individual growth in communication” (1.5pg length)*   * Write a reflective essay and analyze new insights and growth developed as a result of working with a team/group (e.g. roles that you and others assumed in the group, the effective distribution of labor, how you communicated with other group members effectively, and effective approaches to collaborative writing and presentation-making with your peers). * Discuss and provide evidence of what you learned about your communication skills while working with a community partner (e.g. communicating across any differences in a professional organizational setting). * Identify how your oral communication skills developed as a result of the Capstone (e.g. conflict resolution, navigating across difference, listening to others, and public speaking and presentations with various stakeholders, such as class colleagues, community members, and/or other stakeholders). |

**3. PARTICIPATION** is central to developing your critical thinking and communication skills. It is evaluated through your active and thoughtful contributions to discussions with our online meetings and through your group-work. These contributions help refine your managerial and professional communication skills, so everyone is expected to participate in the opportunities to provide feedback. For instance, I may ask students to related course concepts to the project, i.e. during our meetings or following the presentations that are given to the client.

In evaluating class contributions, I consider both quality and the frequency of contribution, but I weigh quality more heavily. In assessing quality, I consider the following dimensions:

* Is the comment creatively demonstrating strategic thinking and visioning?
* Does the comment simply repeat facts or does it provide analysis that adds to our understanding of the case and its broader implications?
* Does the comment fit well into the flow of the discussion? Is it linked to the comments of others?
* Does the comment reflect creative thinking, perhaps by tying together multiple viewpoints or tying back to material covered previously in the course?
* Is the comment delivered in a respectful, constructive tone?
* Overall: How significantly does this contribution enhance the learning environment as a whole?

**VIDEO CHAT STRUCTURE REQUIREMENTS**

* I will meet with each team at least 4 times per the term. These will be sessions focused on the client work, but are open to any questions about the class, coursework, and these are important determinants on your participation grade. Please make sure you are in a place with a good online connection that is ideally quiet and safe. It is not acceptable to participate while driving and video is important to evaluate your engagement.

# DETAILS ON GROUP ASSIGNMENTS: CAPSTONE PROJECT

4. CAPSTONE PROJECT: Solve a Strategy Problem for a Community-based Client

Working with an interdisciplinary team, you will think like a consultant to solve a strategy problem(s) for the client that account for the concepts/theory discussed in the course. You will be assigned a team where ideally, you’ll have team members who represent a cross-section of the business majors. By course end, the team will produce one final written report that makes clear recommendations depending on the Client’s scope of work.

**5. CAPSTONE PROJECT PRESENTATIONS** *(4 PRESENTATIONS GIVEN)*

* Many aspects of the guide for the written report are helpful to addressing the presentation deliverables.
* All presentations **must be uploaded to D2L**.
* They must also be emailed to the client directly after the presentation.
* Time available for each presentation is typically 20 minutes + 5 minutes of Q/A and 30 minutes for the final.

A take away from this class is learning how to present online format as it is quite different from presenting in class. **It is important to avoid the common trap of ‘presenting slides + reading from a pre-prepared script’.** Rather, construct your slides (content, animation, talking points, key pieces of information, figures etc) in way that you orient the viewer to information on the slides. Keep us engaged. Its difficult to watch someone read from a script online after we’ve finished reading the content on the slide. So, think about how many slides you will need to convey what you want to say on a sub-topic and craft some talking points around these slides; find the balance between too much and too little slide content and avoiding over-scripting what you will say beforehand.

**6. CAPSTONE WRITTEN REPORT** should be approximately **18-20 pages, double-spaced**, NOT including charts, graphs, and tables. (These can be put after the main body text, but be sure to explain them in the text.) The report should be typed and organized using subheadings for easy reference and formatted per above details on organization. Ensure all charts/data/sources for quotes are cited. **Each final report will have different elements, including a unique problem focus; depending on the client’s scope of work, some of these sections may not be relevant to your client’s needs. In short, there is no ‘one-size format to fit all group work’.**  See Appendix at the end for a format that makes sense for statements of work / projects that are more akin to a business plan.

**GENERAL GRADING GUIDELINES FOR PROJECT PRESENTATIONS/REPORTS**

The following guidelines are emphasized in grading the deliverables. The weights of these vary per deliverable.

* Demonstration of High Quality Research: Assignments & project deliverables should present information that is current, useful, and directly relevant to the business issues that matter to the deliverable. It’s important to demonstrate that in-depth research has been done. The project deliverable guidelines are helpful here.
* Analysis & Interpretation of Research: Your assignment should demonstrate an understanding of the issues, not just a reiteration/regurgitation of facts and figures found in other sources. A clear, explanatory connection between what has been uncovered by investigation and the recommendations made are critical. Use of course topics and materials should also be apparent.
* Organization: **Write professionally. Be clear & concise. Edit and edit again, then edit.** Your work should be neatly structured (e.g. headings, subheadings), well written, clear and to the point. Final reports are typed, double-spaced (note- this differs from journal entries), 11-point font, with 1” margins. Typographical errors (i.e., grammar, spelling) should be nonexistent. Use figures/charts/graphs as need be (including the source where obtained), as long as they are explained in the text and interpretation is not left to the reader. Since all team members contribute writing, please ensure that the report/presentations read as “one voice”. Carefully document source references and include a bibliography with in-text citations. Use the MLA convention (www.library.cornell.edu/resrch/citmanage/mla OR owl.english.purdue.edu/owl/resource/557/01/ ). I will expect at least 7 different and highly credible secondary sources to be utilized, credited, and cited in your report. DIFFERENT also refers to uncovering various different ‘types’ of sources, where primary data collection such as through surveys or interviews methods can represent a data source.

**GRADING POLICY**

*The letter grade equivalent for the total points is as follows:*

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Grade** | **A** | **A-** | **B+** | **B** | **B-** | **C+** | **C** | **C-** | **D+** | **D** | **D-** | **F** |
| **Minimum Points** | *187* | *180* | *173* | *167* | *160* | *153* | *147* | *140* | *133* | *127* | *120* | *< 120* |

|  |  |  |  |
| --- | --- | --- | --- |
| **ASSIGNMENTS TYPE** | **ASSIGNMENT** | **PTS.** | **%** |
| **INDIVIDUAL REFELECTIVE ENTRIES** | ENTRY1: Diversity & Critical Thinking | 7 | 3.50% |
| ENTRY2: Ethics & Social Responsibility | 7 | 3.50% |
| ENTRY3: Diversity & Community I/F | 7 | 3.50% |
| ENTRY4: Communication | 7 | 3.50% |
| **INDIVIDUAL PARTICIPATION** | WEEKLY PARTICIPATION / GROUP WORK (4 x 3.5points) | 14 | 7.00% |
| **ONLINE TEST VIDEO CHAT** | Testing that you know how to | 1 | 0.50% |
| **SYLLABUS ONLINE QUIZ** | SYLLABUS, WEEK 1 | 3 | 1.50% |
| **INDIVIDUAL ONLINE QUIZ** | Chapter 1-2 | 7 | 3.50% |
| **INDIVIDUAL ONLINE QUIZ** | Chapter 3 | 7 | 3.50% |
| **INDIVIDUAL ONLINE QUIZ** | Chapter 4 | 7 | 3.50% |
| **INDIVIDUAL ONLINE QUIZ** | Chapter 5 | 7 | 3.50% |
| **INDIVIDUAL ONLINE QUIZ** | Chapter 6 | 7 | 3.50% |
| **INDIVIDUAL ONLINE QUIZ** | Chapter 7 | 7 | 3.50% |
| **INDIVIDUAL ONLINE QUIZ** | Special topic/Alliances | 7 | 3.50% |
| **GROUP CAPSTONE CLIENT PRESENTATIONS** | Pres of PESTEL + 6 FORCES + OT | 16 | 8.00% |
| Pres of VRIO + SW | 16 | 8.00% |
| Pres of FINANCIALS | 16 | 8.00% |
| Pres of FINAL PLAN | 24 | 12.00% |
| **GROUP WRITTEN REPORT** | Final Recommendations Report | 40 | 20.00% |
| \* NOTE, POINTS ADD TO 207, BUT LOWEST QUIZ GRADE WORTH 7 QUIZ PTS IS DROPPED | **Total:** | 207 | 103.5% |

**TECHNOLOGY REQUIREMENTS**

**Information related to D2L**: <http://www.pdx.edu/oit/online-class-support>

**Help desk information:** Phone | Available 24/7 503-725-HELP (4357) | Email [help@pdx.edu](mailto:help@pdx.edu)

Location| Mon-Fri 8am-7pm, Smith Memorial Student Union Room 18 (basement) 1825 SW Broadway, Portland

# LATE POLICY /MISSED CLASSES ASSIGNMENTS + ACADEMIC HONESTY

**Late Work:** All assignments are due at the time noted in D2L, where late work will not be accepted. For instance, to take the quiz are also pre-programmed in D2L, so do make sure to make time for the exams also.

**Academic Honesty**: Students will uphold the honor code in all work associated to this course. All work must be original and non-original work should be appropriately referenced. Copying material from the internet or any other source without proper citation is considered plagiarism and cheating and will receive a failing grade. For more information regarding PSU’s policies on behavior and academic honesty, please see: <http://www.pdx.edu/dos/psu-student-code-conduct>

**WEEKLY COURSE FLOW**



**ADVISING AND ASSISTANCE**

The SBA provides academic advisors as well as career/internship advisors to assist students to enrich their college experience. Academic advisors are trained to provide counsel in a wide range of issues. From selecting a business major to evaluating transferred transcripts, academic advisors are here to help students with all of their degree related questions. All SBA advisors are available by appointment, which must be scheduled in advance. Drop-in hours are available as well. Drop-in hours are held regularly throughout the week and are designed to help answer routine or simple questions. For more information about SBA advising and drop-in hours please visit the School of Business website at <http://www.pdx.edu/sba/> and click on student resources. The following is a brief summary of the type of issues with which academic advisors can offer assistance: **DARS reports / SBA admissions requirements / Major selection and requirements / Transcript evaluation / Course overrides / Transfer credit petitions / Career planning / Portland State rules and policies**

# COURSE POLICIES

**NETTIQUETTE:** Network etiquette is concerned with the "proper" way to communicate in an online environment. These rules apply to your communication with each other, the client, and myself. Consider the following "rules," adapted from Virginia Shea's The Core Rules of Netiquette, whenever you communicate in the virtual world (Taken from: [**http://learning.colostate.edu/guides/guide.cfm?guideid=4**](http://learning.colostate.edu/guides/guide.cfm?guideid=4)and adapted from *The Core Rules of Netiquette* Shea, V. (1994). *Core rules of netiquette. Netiquette* (Online ed., pp. 32-45). San Francisco: Albion Books).

**Rule 1: Remember the Human;** when communicating electronically, whether through email, discussion post, text, or some other method, practice the Golden Rule: Do unto others as you would have others do unto you. Remember, your written words are read by real people, all deserving of respectful communication. Before you press "send" or "submit," ask yourself, "Would I be okay with this if someone else had written it?**"**

**Rule 2**: **Adhere to the same standards of behavior online that you follow in real life**

**Rule 3: Know where you are in cyberspace;** the same communication can be acceptable in one area, where it might be considered inappropriate in another. A text to a friend may not be appropriate in classmate email.

**Rule 4: Respect other people's time and bandwidth;** electronic communication takes time: time to read and time in which to respond. Most people don't have time to read or respond to frivolous emails. As a virtual world communicator, it is your responsibility to make sure that the time spent reading your words isn't wasted. Make your written communication meaningful and to the point, without extraneous text or superfluous graphics or attachments that may take forever to download. Try not to just forward links; explain & summarize the content.

**Rule 5: Make yourself look good online.** One of the best things about the virtual world is the lack of judgment associated with your physical appearance, sound of your voice, or the clothes you wear (unless you post a video of yourself singing Karaoke in a clown outfit.) You will, however, be judged by the quality of your writing, so keep the following tips in mind:

* **Always check for spelling and grammar errors**
* **Know what you're talking about and state it clearly**
* **Be pleasant and polite**

**Rule 6: Help keep flame wars under control;** what is meant by "flaming" and "flame wars?" "Flaming is what people do when they express a strongly held opinion without holding back any emotion." (Shea, 1994). As an example, think of the kinds of passionate comments you might read on a sports blog. While "flaming" is not necessarily forbidden in virtual communication, "flame wars," when two or three people exchange angry posts between one another, must be controlled or the camaraderie of the group could be compromised. Don't feed the flames; extinguish them by guiding the discussion back to a more productive direction.

**COMMUNICATION:** Email [tedkhoury@pdx.edu](mailto:tedkhoury@pdx.edu) is the fastest way to typically get a hold of me. I’m available a great deal throughout the week, but not at all hours at all times, so do keep this in mind for any time-sensitive questions you have.

**GROUP PROJECT WORK & HANDLING OF ANY GROUP CONFLICTS:** Team members will be collectively responsible for completing each of the Capstone assignments and the grades earned on the Team Projects will be assigned equally to each group member.Each team should elect a “Team Leader” to direct the development of the various components of the project work, make life easier on the client, organize team meetings, help lead team discussion and communicate with the professor or client from time to time. The professor may communicate to the Team Leader or any team member as needed.Don’t be the ‘free-rider’ on the project. I'm sure all of you have been on teams where someone did not fully contribute to the project, but expected the same grade as those making a strong contribution. Therefore, strong contributions to projects, showing a collaborative attitude, regular attendance to team meetings are essential for optimalgrading**.** In situations where someone is not sharing in the responsibilities of the project, or delivering poor quality / late work to the group, I may use peer evaluations to assess one’s contributions. If there’s a problem that I am made aware of: **Step 1** is for all of us to meet and sort things out with an improvement-plan. **Step 2** is a follow-up meeting to check on improvement. **Step 3**, peer evaluations, which can retroactively affect your grade on previously graded assignments, only occurs if there are still problems. In this case, individual grades on the project may be adjusted for a lack of group participation at the discretion of the professor. **An individual’s project grades can be as much as 30% less than the group’s per this review process**.

**Disability Services:**

Students with disabilities should register with the PSU Disability Resources Center [(503-725-4150](tel:%28503-725-4150) TTY or Relay [503-725-4178](tel:503-725-4178)) to document their need for accommodations and obtain support services.

**HOW TO SUCCEED IN ONLINE COURSE WORK (**Adapted from Stephen Gatlin, President and CEO of Gatlin Education Services)

Time Management: Time management may be the biggest factor in succeeding in your online program or course. Successful online students have to be very proactive in their studies and take responsibility for their own learning.

To master time management, first determine what time of day you think you will be most focused on your studies. Are you a morning person or a night owl? Do you concentrate best after a cup of coffee or after lunch? Once you narrow in on a time of day reserve a designated allotment of time to dedicate to your course. Stay committed to that reserved time and treat it like an appointment that can’t be changed.

Balancing Personal Obligations: While there are many reasons to take an online course – one of the most frequent reasons students choose these courses is because of the convenience. Whether you have a full-time job, don’t want to fight traffic or are raising a family – balancing school and personal obligations can become a juggling act.

The beauty of online coursework is that you can study around your schedule – so be sure to set study time during your down time – even if that means 11 p.m.  Put your studies first (and therefore yourself!) for a significant time each week.

Study Environment: An ideal study environment is just that – ideal. Some students need absolute silence while others can’t seem to concentrate without noise in the background. No matter what your preference, a well-lit place that is free from distractions is recommended. Note that you’ll make much better use of thirty minutes of disruption-free study than an hour’s worth of commotion-filled learning. If you can’t escape in-home interruptions, try the library or a coffee shop. Schedule your designated study time when you can be in a distraction-free environment and your chances for success will increase and the time you need to devote to your course will decrease.

Questions: Don’t be afraid to ask questions. As an online student there are several ways to get the answers you are seeking. You can always direct inquiries to your instructor. We never want you to feel lost or alone during the e-learning process.

Online conference rooms or synchronous video conferences are another great resource for students seeking answers. Online conference rooms give students a forum to meet other students taking the same course and ask questions or discuss assignments. More than likely another student taking the course has had or will have the same question.  Use the Course Questions area in the discussion tool or schedule a conference with a peer or any of our staff.

If you need an immediate answer – do your best to find the answer yourself. You’ll likely satisfy other lingering questions in the process and often times the journey to the answer teaches you more than the answer itself.

Get What You Give: Remember our program is designed to provide the skills necessary to acquire professional caliber positions for in-demand occupations. The more effort you put forth in these online courses to comprehend the lessons taught the more likely you are to succeed after the course is finished. Extra effort during the course will lead to an easier transition in your new positions or with your new responsibilities.

**E-learning has a lot to offer students who dedicate the time and focus to extracting everything the course has to offer. If you’ve been an on-campus student for most of your coursework, really try and hone some new skills around communicating online and working with virtual teams. They are such differentiating and relevant skills in the world today.**

**Best of luck and enjoy your capstone!**

APPENDIX

**What follows is a very general guide that includes elements that are common in business/marketing projects:**

*I. INTRODUCTION:*

* *Cover Page –* The cover page should clearly state all members of your group alphabetically by last name, the client’s organization, and the date.
* *Table of Contents –* Sections of the report and page numbers. The appendix must be ordered in the sequence referred to in your paper.
* *Executive Summary -* The purpose is to provide a quick overview for easy reference and to create interest and “excitement” for the reader to continue into the specifics of the report. The executive summary should be written after the body of the report is completed. Each paragraph is similar to a “journal abstract” and should be an informative summary of the critical recommendations of each section. Some general guides:
  + State the overall key strategy problem(s)/confronting issue/opportunity that faces the client per the SOW.
  + You then briefly state or summarize how much and which of the challenges are based on external versus internal environment issues and how this creates and relates to the strategic options analyzed (1/3 page).
  + Lastly, you state your overall recommendation that you have for the client, and how the rest of the analysis serves to support this recommendation. (1-2 sentences)
  + A final paragraph summarizes each area covered in the body of your plan that supports your recommendations, such as Client Description/Management, Marketing, Financial Analysis, and Strategic internal/external areas of focus. Whatever these areas are per your SOW, briefly summarize why they matter to your recommendations (no longer than 1 page).

*II. BODY: (\* means a chart is required in addition to the FULL text explaining the chart)*

* An Introduction to the Client, their History, Challenges, Opportunities and Current State of Operations:
* Summarize the key pieces of client/market information that are meaningful to addressing their issues. This is essentially an outline of the client’s strategy problems. You can do this in paragraph form and then break out certain ‘lists’ if need be (with bullets/numbers). Ideally, if you can relate the “intended strategy vs. realized strategy” that occurred, you are on the right track. Set the stage for recommendations.
* Organization’s history: Here, you only care about the history that matters to a consultant making a strategy recommendation. Do this if the history is relevant to the consulting project.

*Management Strategy*- Use the following rough guide—again, what appears here is client/SOW-specific:

* Future (needed) Organizational Structure (may include external vs. internal resources, such as alliances)\*
* Necessary Human Resources-related Issues (Wages and Benefits)\*
* Production Process\* (PERT diagram of process or schedule that matters to the Client’s organization. Example: restaurant – daily schedule, remodeler – job schedule, financial planner – client meeting etc.)

*Market Strategy/Feasibility Analysis:* Based on the first two presentations/analyses presented. This section should be rich with information & analytical rigor! How you arrived at your conclusions is meaningful to the client.

* Target Markets Focusing on Client’s Strategic Issue (RESEARCH – should have 7 –10 “cited” sources)
* You should focus only on the aspects or specific external environmental dimensions that matter.
* Include an updated VRIO analysis of their key resources and combinations of resources according to RBV in how they support sustainable or temporary competitive advantages.
* Summarize, the key aspects of the internal environment that affects the firm’s ability to realize their “intended strategy” (i.e. corporate culture problems, turnover, lack of capability).
* Competitor analysis (detailed analysis of the top 3-5 competitors relevant to strategy problem, SWOT)
* If conducting an alliance strategy plan (i.e. per licensing plan), do a detailed analysis on the top 3 partners.
* Time matters. If industry cycles/events exist that affect some competitors more than others, note these.
* Focus on Product/Service Characteristics & Pricing Strategy vs. manufacturing/service offering constraints.
* What Promotional Plan (promotional mix and budget) makes sense per their challenges/opportunities?

# *Financial Plan:* The financial analyses/exercises reviewed in class *may* be relevant, but you essentially have to identify which financial exercises/analyses matter to your client’s problems. Here, you must 1) identify the correct exercises/analysis methods, 2) show that you have identified the right pieces of data that help you perform this analysis, and 3) in cases where you are unable to get information, you need to show how and why you made specific assumptions in your model. These models should be extremely comprehensive.

* For each exercise you determine, multiple scenario analysis is required given any contingencies. Note the contingent assumptions you made and how they matter to the identified exercise. Justify!

Some examples of applicable exercises may include:

* Financial Feasibility Study: How much money does the Client need to act on the recommended strategy and how do you propose they obtain this money? At what timing or according to what assumptions is the money needed?

Overall will this project be successful and why? (last part of this section)

* Projection of anticipated costs at start up\* (research – cite your sources)
* Projected monthly cash flows / operating budgets\*
* Pro Forma Income Statement for first 3 years, Sales projections for 2 years of operation per your plan\*
* Break even projections\* (refer to text and [www.JavaCalc.com](http://www.JavaCalc.com))
* What kind of licensing revenue should the client expect from licensing their technology out? Comparing this to keeping product inside the firm… or licensing out for specific applications, regions, etc.\*
* What are the trade-offs (revenue, cost, market-access, quality, reputation etc.) of partnering vs. in-house?

*III. CONCLUSION AND FINAL RECOMMENDATIONS:*

Strategic Alternatives For The Firm To Consider To Be More Competitive:

* Go over 2-4 options that you have uncovered for the firm to consider in moving forward. Describe each of these with at least a paragraph. Weigh only the relevant pros/cons of each. They may concern different aspects of firm strategy. For instance, they may have specific problems in managing organizational culture problems for which you have a couple of recommendations, while also facing some external environmental issues that require different alternatives to be proposed.

Strategic Recommendations*:* What should the client do, and why, regarding its strategic challenges?

* Consider the short-term (one year or less), intermediate (2 -3 years) and long-range (4+ years) goals. These are GOALS – Small, Measurable, Achievable, Realistic, and Specific. “THUS, based on these alternatives… the consulting team recommends the following strategies to be pursued: (STATE THESE HERE)” No new research material for why they do this— just need to defend this choice relative to the other options on why it’s the best through analyzing the options. Here, you say WHAT you recommend, WHY you recommend it (per all your research/analysis), and sudden or emergent CONTINGENCIES that the firm needs to be aware of in embarking on this strategy so that they realize what they intend to do.

CONCLUSIONS [1/2 page]:

* Here, you review the ‘sub’-summaries of each of first 3 sections and, therefore, how it leads to the final recommendation. No new material here, just need to make sure everything ties together.

*IV. ADDITIONAL ATTACHMENTS:*

* Appendix: All full-page charts, tables, graphs, etc. (smaller tables figures can be integrated in text)
* Bibliography:Possible types of sources include credible Internet, competitor information, brochures, personal interviews, marketing collateral, periodicals, newspapers, trade journals and books (one or more of each type – often students have a total of 5 or more sources for each “type”).

\*While recommended page lengths are given for some of the written portions of the project, note that page length is not

as important as adequately addressing the assignment through the general guidelines provided above. Many of the

sections identified here may not be relevant to your project.