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Fall 9-1-2022

BGEN 499.03: Strategic Management

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Syllabus
BGEN499: Strategic Management
Fall 2022 ~ T/R 9:30-10:50am ~ GBB 201

◆ **Class Values:**

- ✓ *Conscientiousness*: show up prepared and do what you say you will do.
- ✓ *Communication*: share information and proactively address issues.
- ✓ *Respect*: compassion and understanding for others.

◆ **Instructor Information**

Professor Christina Robichaud, JD, PhD
Email: christina.robichaud@umt.edu
Cell: 832-607-1751
Office Hours: Office GBB 322, T/R 12-2pm (and by appointment)

◆ **Course Information**

- BGEN 499-Section 3. Pre-Requisites: Senior standing; COMX 111, ECNS 202, BGEN 220 with grades C or better; and completed upper business core.
- 3 credits. Letter grade.
- In-person, face-to-face environment. Group and individual work.
- Required eTextbook: Hill, C. W. L., Schilling, M. A., & Jones, G. R. (2019). *Strategic Management: An Integrated Approach: Theory & Cases* (13e ed.). Cengage.¹
- Moodle page for announcements, materials, links, and uploading assignments.

◆ **Course Description & Objectives**

Students will analyze strategic issues that firms may encounter during their pursuit of competitive advantage in today's increasingly dynamic and global business environment. ***This is the capstone course.*** Therefore, ideas and concepts from prior business curriculum should be integrated into a 360-degree, wholistic view of the firm. Students will adopt the viewpoint of a top executive decision-maker in order to: understand the influence of the business environment, recognize differences in the way firms compete, analyze business outcomes, and provide recommendations. In the process, students will further develop their critical thinking, business writing, presentation, and team/group skills.

- Learning Objective 1: Integration of cumulative business knowledge.
- Learning Objective 2: Fulfill UM's Upper-Division Writing Requirement in the Major.

◆ **Summary of Course Responsibilities²**

	Grade %
Current Event & Discussion Leader	5
Group Strategic Analysis Worksheets (1% each, must be present for credit)	13
Group Analysis Presentations (3 presentations x 5% each)	15
Individual Strategic Analysis Report ³ (Part 1 10%, Part 2 10%, Final Report 30%)	50
Exam 1	5
Final Exam	12
Total	100%

Grading Scale:

A = 93%+ A- = 90-92% B+ = 87-89% B = 83-86% B- = 80-82% C+ = 77-79%
C = 73-76% C- = 70-72% D-F ≤ 69%

¹ Included in the Bookstore's Inclusive Access Program—granting a discounted rate. If materials are purchased elsewhere, opt-out by the add/drop deadline (<https://solve.redshelf.com/hc/en-us/requests/new>).

² Additional information about Course Responsibilities on Pages 5-8 and supplemented throughout the course.

³ Serves to satisfy the University of Montana's Advanced College Writing requirements.

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◆ **Mission Statement and Assurance of Learning**

The College of Business at the University of Montana creates transformative, integrated, and student-centric learning experiences, propelling our students to make immediate and sustained impact on business and society. We nurture our students' innate work ethic to develop confident problem solvers and ethical decision makers. We pursue thought leadership and collectively create opportunities for a better life for our students, faculty, and staff.

COB Core Values:

- Students first: We educate the whole person
- Experiential learning: We create experiences that matter.
- Thought leadership: WE create rigorous and relevant knowledge.
- Stewardship: We value people, planet and profit.

COB Learning Goals:

As part of our assessment process and assurance-of-learning standards, the COB has adopted the following learning goals for our undergraduate students:

- Learning Goal 1: COB graduates will possess fundamental business knowledge in the core disciplines of Accounting, Finance, Management Information Systems, Management and Marketing.
- Learning Goal 2: COB graduates will be able to integrate business knowledge.
- Learning Goal 3: COB graduates will be effective communicators.
- Learning Goal 4: COB graduates will possess problem-solving skills.

◆ **Accessibility**

If you are a student with a disability and wish to request reasonable accommodations for this course, contact me privately to discuss the specific modifications. If you have not yet registered with the Office for Disability Equity (ODE), located in Lommasson Center 154, please do so in order to coordinate your reasonable modifications. For more information: www.umt.edu/disability.

◆ **Diversity, Equity, & Inclusion (DEI)**

Consistent with the UM Diversity, Equity, and Inclusion Plan, I strive to include the representation of different identities, characteristics, experiences, and perspectives of all students. I aim to offer everyone what they need to succeed by increasing access, resources, and opportunities for all, especially for those who are systematically underrepresented and have been historically disadvantaged. I desire to create a welcoming learning environment in which differences are celebrated and everyone is valued, respected, and able to reach their full potential. For more information: <https://www.umt.edu/diversity-equity-inclusion-plan/>.

◆ **Cultural Leave Policy**

UM has a Cultural and Ceremonial Leave Policy: "Cultural or ceremonial leave allows excused absences for cultural, religious, and ceremonial purposes to meet the student's customs and traditions or to participate in related activities. To receive an authorized absence for a cultural, religious or ceremonial event the student or their advisor (proxy) must submit a formal written request to the instructor. This must include a brief description (with inclusive dates) of the cultural event or ceremony and the importance of the student's attendance or participation. Authorization for the absence is subject to approval by the instructor. Appeals may be made to the Chair, Dean or Provost. The excused absence or leave may not exceed five academic calendar days (not including weekends or holidays). Students remain responsible for completion or make-up of assignments as defined in the syllabus, at the discretion of the instructor."

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◆ **Mental Well-Being**

At UM, we value every student's wellbeing and believe that taking care of yourself is imperative to your success as a student. College students often experience issues that may interfere with academic success such as academic stress, sleep problems, juggling responsibilities, life events, relationship concerns, or feelings of anxiety, hopelessness, or depression. If you or a friend is struggling, we strongly encourage seeking support. Helpful, effective resources are available on campus.

- If you are struggling with this class, please visit during office hours or contact me directly.
- Check-in with your academic advisor if you are struggling in multiple classes, unsure whether you are making the most of your time at the University of Montana.
- Reach out for Counseling Support at Curry Health Center Counseling. To make a counseling appointment call 406-243-4712 or go online to the Curry Health Portal to schedule an appointment
- If you feel you need accommodations for a mental health concern, reach out to the Office of Disability Equity (ODE) at 406-243-2243.
- If you feel that you would benefit from general wellness skills to support your overall stress reach out to CHC-Wellness at 406-243-2809.
- If you have experienced sexual assault, relationship violence, bullying, intimidation, or discrimination contact the Student Advocacy Resource Center (SARC) 406-243-4429 *24/7 support line 406-243-6559.
- If you are experiencing a mental health crisis and seeking immediate help, call 911, go to the nearest hospital emergency room or call Campus Safety at 406-243-4000.

Other Resources:

- 24/7 National Suicide Prevention Lifeline/Crisis Counseling: 1-800-273-TALK(8255)
- 24/7 Community Resource line, text 211 or go to: <https://montana211.org/>
- The Strong Hearts Native Helpline: (844) 762-8483
- National Crisis Text line, text "HOME" to 741741
- STUDENTS OF COLOR, text "STEVE" to 741741
- LGBTQIA2S+ Students, text "START" to 678678
- 24/7 Trevor Lifeline - for LGTBQIA2S+ folks in Crisis: (866) 488-7386, <https://www.thetrevorproject.org/>.

◆ **Food and Housing Insecurity**

Any student who faces challenges securing food or housing, and believes that this could affect their performance in this course, is urged to contact any or all of the following campuses resources:

- **Food Pantry Program:** UM offers a food pantry that students can access for emergency food. The pantry is open on Tuesdays from 12 to 5 PM and Fridays from 10 AM to 5 PM. The pantry is located in UC 119 (in the former ASUM Childcare offices). Pantry staff operate several satellite food cupboards on campus (including one at Missoula College). For more information about this program, email umpantry@mso.umt.edu, visit the UM Food Pantry website or contact the pantry on social media (@pantryUm on twitter, @UMPantry on Facebook, um_pantry on Instagram).
- **ASUM Renter Center:** The Renter Center has compiled a list of resources (<https://medium.com/griz-renter-blog>) for UM students at risk of homelessness or food insecurity. Students can schedule an appointment with Renter Center staff to discuss their situation and receive information, support, and referrals.
- **TRiO Student Support Services:** TRiO serves UM students who are low-income, first-generation college students or have documented disabilities. TRiO services include a textbook loan program, scholarships and financial aid help, academic advising, coaching, and tutoring. Students can check their eligibility (www.umt.edu/trioss/apply.php) for TRiO services online. If you are comfortable, please come see members of the teaching team. We will do our best to help connect you with additional resources.

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◆ **Academic Misconduct, University and College of Business Codes of Conduct**

The University of Montana College of Business seeks to develop future leaders with the highest ethical standards. It is through a strong code of conduct that we maintain mutual trust and respect among students, faculty, and staff. All students must practice academic honesty.

Academic misconduct, includes but is not limited to: disrupting class; plagiarism; possession of course materials from previous sessions of this course; giving, receiving, or unauthorized uses of aides during tests or giving test questions to another students who has not yet taken a given test; or posting class materials to a public website in violation of intellectual property rights.

Academic misconduct is subject to an academic penalty by the course instructor and/or a disciplinary sanction by the University. The University of Montana Student Conduct Code specifies definitions and adjudication processes for academic misconduct and states, “Students at the University of Montana are expected to practice academic honesty at all times.” (Section V.A., available at <http://www.umt.edu/student-affairs/dean-of-students/default.php>).

COB Code of Professional Conduct available at: <http://www.business.umt.edu/ethics/professional-conduct-code.php>.

◆ **Grievance Procedures**

The formal means by which course and instructor quality are evaluated is through the written evaluation procedure at the end of the semester. The instructor and department chair receive copies of the summary evaluation metrics and all written comments sometime after course grading is concluded. Students with concerns or complaints during the semester should first communicate these to the instructor. This step almost always resolves the issue. If the student feels that the conflict cannot be resolved after meeting with the instructor, the student should contact the department head. If, after speaking with the department head and the instructor, the student still feels that the conflict has not been resolved, contact the Associate Dean of the College of Business.

◆ **Drops and Incomplete Grades**

This course follows published UM policies on drop dates and incomplete grades. Policy per the UM catalog: “Incomplete grades are not an option to be exercised at the discretion of a student. In all cases it is given at the discretion of the instructor within the following guidelines. A mark of incomplete may be assigned students when (1) the student has been in attendance and doing passing work up to three weeks before the end of the semester, and (2) for reasons beyond the student's control and which are acceptable to the instructor, the student has been unable to complete the requirements of the course on time. Negligence and indifference are not acceptable reasons.

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◆ **Current Events & Discussion Leader**

- Objective: Develop an understanding of the current environment and business realities.
- Grading: 5% of total grade. Credit/no credit for participating in-class.
- Task: Each student will sign-up for one date to: (1) present a quick summary of a news article from a reputable business source (e.g., WSJ); (2) answer questions posed by the Professor or peers; and (3) lead discussion activities during that class. Topical questions will be posted to Moodle. **NOTE: All students are generally responsible for class participation, even if not scheduled as the Discussion Leader for that day.**

◆ **Group Strategic Analysis Worksheets**

- Objective: Communicate with business owners, engage in critical thinking, and hands-on practice with real-world business problems. Worksheets break into pieces the complex task of analyzing a firm's environment, strategic decision making, and implementation.
- Grading: 13% of total grade (1% each). Credit/no credit for participating in-class.
- Task: Completed in-class, in-group. Upload answers to Moodle.

◆ **Group Analysis Presentations**

- Objective: Demonstrate professionalism and business communication skills.
- Grading: 15% of total grade (5% for each Parts 1, 2, and 3). Letter grade.
- Task: Practice verbal communication skills, presenting information to business audiences, professionalism, responding to Q&A, and receiving constructive feedback.
- Part 1—External Environment Analysis, such as an overview of the local business, industry stage, Porter's 5-Forces, and PESTEL/STEEPLE.
 - 5 slides (including Title slide), 5 minutes max., plus 15 minutes for Q&A.
- Part 2—Internal Environment Analysis, such as internal systems, SWOT, competitive advantage(s), and problems the business is facing.
 - 5 slides (including Title slide), 5 minutes max., plus 15 minutes for Q&A.
- Part 3—Strategy & Implementation Plan for how the chosen strategic recommendation could solve the identified problem, be implemented, and impact internal systems. **NOTE: Groups will reflect on peers' presentations in a "Competitor Reaction" uploaded to Moodle.**
 - 5 slides (including Title slide), 5 minutes max., plus audience Q&A.

◆ **Individual Strategic Analysis Report (Formal Writing Assignment)**

- Objective: Demonstrate advanced writing skills, as well as business communication skills, critical thinking, and integration of cumulative business knowledge.
- Grading: 50% of total grade (10% for Part 1, 10% for Part 2, and 30% for Final Report). Score of 1-4 per the University-wide Rubric on Page 7 herein, and converted to letter grade (Score of 4=10 points, score of 3=7.5 points, score of 2=5 points, score of 1=2.5 points).
- Task: See next pages for more details.

◆ **Exam 1**

- Objective: Demonstrate a baseline understanding of the language (keywords) and concepts used in the management of a business and its strategy.
- Grading: 5% of total grade. Letter grade.
- Task: 50 multiple-choice, randomized questions. Open-note, open-book. 80 minutes to complete. Access via Moodle page.

◆ **Final Exam**

- Objective: Demonstrate critical thinking and integration of cumulative business knowledge.
- Grading: 12% of total grade. Letter grade.
- Task: In-Class, Closed-note, closed-book. A short case with short-answer questions analyzing strategy, environment, competitive advantage, and strategic recommendations.

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◆ **Individual Strategic Analysis Report (Formal Writing Assignment)**

During this capstone class, each student is expected to demonstrate writing proficiency to satisfy the University's general education advanced college writing requirement for all College of Business students through the integration of material from the entirety of their matriculation through a running strategic analysis of a local, small business with research and writing on your own.

This formal writing assignment is designed to accomplish the following Learning Outcomes:

- Use writing to learn and synthesize new concepts.
- Formulate and express opinions and ideas in writing.
- Compose written documents that are appropriate for a given audience or purpose.
- Revise written work based on constructive feedback.
- Fine, evaluate, and use information effectively.
- Begin to use discipline-specific writing conventions (largely style conventions like APA or MLA).
- Demonstrate appropriate English language usage.

Each student will use begin the analysis and research processes in-class and in groups using the Group Strategic Analysis Worksheets provided by the Professor. Then, each student will **individually** prepare while **out-of-class** a formal written report for each Part 1, Part 2, and the Final Strategic Analysis (summarized below).

Part 1 Individual Report—External Environment:

- Grading: 10% of total grade. Score of 1-4 per the University-wide Rubric on the following page.
- Task: Each student will conduct an analysis of the firm's external environment, including a brief bio about the local business, industry stage, Porter's 5-Forces, and PESTEL/STEEPLE. Feedback from the Part 1 Group Presentation should be incorporated into this Part 1 Report. Additionally, the Professor will provide constructive feedback on this report which the student will use to make revisions and include as part of the Final Individual Strategic Analysis Report.
- Format: 12-point font, 1-inch margins. Minimum 3 pages, single-spaced throughout (max. 5 pages), including citations, figures, and tables. APA style (<https://libguides.lib.umt.edu/citation/APA>).

Part 2 Individual Report—Internal Environment:

- Grading: 10% of total grade. Score of 1-4 per the University-wide Rubric on the following page.
- Task: Each student will conduct an analysis of the firm's internal environment, including internal systems, SWOT, competitive advantage, and problem-identification. Feedback from the Part 2 Group Presentation should be incorporated into this Part 2 Report. Additionally, the Professor will provide constructive feedback on this report which the student will use to make revisions and include as part of the Final Individual Strategic Analysis Report.
- Format: 12-point font, 1-inch margins. Minimum 3 pages, single-spaced throughout (max. 5 pages), including citations, figures, and tables. APA style (<https://libguides.lib.umt.edu/citation/APA>).

Final Individual Strategic Analysis Report:

- Grading: 30% of total grade. Score of 1-4 per the University-wide Rubric on the following page.
- Task: Each student will add to the content from Part 1 and Part 2 Reports, by providing strategy recommendations, including a description of the two strategies (1 local, 1 radical) and explanations of how each could solve the identified problem and fit with existing firm strategy and structure.
- Format: 12-point font, 1-inch margins. Minimum 20 pages, single-spaced throughout (max. 25 pages), including citations, figures, and tables. APA style (<https://libguides.lib.umt.edu/citation/APA>).
NOTE: At least 14 pages should be new, previously unsubmitted content, while the remaining 6+ pages of the Final Report will be the revised content from Part 1 and 2 Reports.

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University-wide Program-level Writing Assessment Holistic Rubric

(Created by the ASCRC Writing Committee, Revised May 13, 2013)

Score 4: Advanced

- The texts show a strong sense of purpose and audience.
- Expression of ideas is articulate, developed, and well-organized.
- These texts demonstrate a clear ability to synthesize concepts.
- The texts consistently show the writer's ability to evaluate and use information effectively.
- Writing style (word choice and sentence fluency) is highly effective for the purpose and audience.
- The writer is beginning to use discipline-specific writing conventions with general success.
- While there may be a few errors in grammar, usage, and mechanics, a strong command of English language usage is clearly evident.

Score 3: Proficient

- The texts show a clear sense of purpose and audience. Expression of ideas is generally developed and organized.
- These texts demonstrate an ability to synthesize concepts.
- The texts show the writer's ability to evaluate and use information.
- Writing style (word choice and sentence fluency) is effective for the purpose and audience.
- The writer is beginning to use discipline-specific writing conventions with uneven success.
- While there may be some errors in grammar, usage, and mechanics, a competency in English language usage is evident.

Score 2: Nearing Proficiency

- The texts show some attention to purpose and audience. Expression of ideas may be vague, unclear, and/or unorganized at times.
- These texts demonstrate developing ability to synthesize concepts.
- The texts reveal the writer's uneven ability to use information; use of information may be insufficient.
- Writing style (word choice and sentence fluency) is sometimes ineffective for the purpose and audience.
- The writer shows minimal knowledge of discipline-specific writing conventions.
- A basic control of English language usage is apparent, even though frequent errors in grammar, usage, or mechanics may occasionally hinder understanding.

Score 1: Novice

- The texts show little understanding of purpose and/or audience.
- Expression of ideas is confusing, minimal, or irrelevant; the organization is illogical or weak.
- These texts demonstrate difficulty in synthesizing concepts.
- The writer's use of information is inaccurate, inappropriate, or missing.
- Writing style (word choice and sentence fluency) is not effective for the purpose and audience.
- The writer shows little to no awareness of discipline-specific writing conventions.
- Severe problems with grammar, usage, and mechanics show poor control of English language and impede understanding.

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◆ **In-Class Structure**

- Current Events.
- Topic introduction/lecture.
- Experiential activities (e.g., small cases, group discussions, guest speakers).
- Group Project Worksheets.

◆ **Course Schedule (subject to change as needed)**

DATE	TOPIC	In-Class Worksheet	Textbook Chapter
T, Aug. 30	<i>Introduction to Strategic Management</i>		
R, Sept. 1		Sign-up for Current Event date	1
T, Sept. 6			3-3 (pgs. 86-94)
R, Sept. 8	Exam 1, Online, Open-note, Open-book.		
T, Sept. 13	<i>Realities Businesses Face — External Environment</i>	Sign-up for Group Project; #1 Local Company Bio	Appendix C-5
R, Sept. 15		#2 Industry Forces	2
T, Sept. 20		#3 Industry Stage	6
R, Sept. 22		#4 Competition	
T, Sept. 27		#5 PESTEL	Appendix C-10
R, Sept 29	Groups 1-4 Presentations: Part 1 External Analysis Presentation		
T, Oct. 4	Groups 5-8 Presentations: Part 1 External Analysis Presentation		
R, Oct. 6	Project Work Day. Part 1 <u>Individual</u> Report—External Analysis due by midnight		
T, Oct. 11	<i>Succeeding From Within —Internal Environment</i>	#6 VRIO	3
R, Oct. 13		#7 SWOT	Appendix C-5 (steps #3-4)
T, Oct. 18		#8 S.C.A.	4 & Appendix C-11
R, Oct. 20	Groups 5-8 Presentations: Part 2 Internal Analysis Presentation		
T, Oct. 25	Groups 1-4 Presentations: Part 2 Internal Analysis Presentation		
R, Oct. 27	Project Work Day. Part 2 <u>Individual</u> Report—Internal Analysis due by midnight		
T, Nov. 1	<i>Strategy Formulation & Implementation</i>	#9 Problem Solving	1-6 to 1-9
R, Nov. 3		#10 Current Strategy	5
T, Nov. 8	No Class — Get Out & Vote!		
R, Nov. 10	<i>Strategy Formulation & Implementation (cont'd through Dec. 1)</i>	#11 M&A & Innovation	9 & 10
T, Nov. 15		#12 Alliances	7 & 8
R, Nov. 17	Project Work Day. Final <u>Individual</u> Strategic Analysis Report due Friday, November 18th by midnight.		
T, Nov. 22		#13 Plan	11-3 to 11-5
R, Nov. 24	No Class — Happy Thanksgiving!		
T, Nov. 29	(in-class status checks w/ Professor—all groups)	#13 Plan (cont'd)	12
R, Dec. 1	(in-class status checks w/ Professor—all groups)	#13 Plan (cont'd)	
T, Dec. 6	Groups 1-4 Presentations: Strategic Recommendation & Implementation Plan + In-Class “Competitor Reactions”		
R, Dec. 8	Groups 5-8 Presentations: Strategic Recommendation & Implementation Plan + In-Class “Competitor Reactions”		
R, Dec. 15	10:10am-12:10pm - Final Exam, In-Class, Closed-note, Closed-book.		