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BMGT 426.02: Strategic Management

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BMGT 426: Strategic Management

Autumn 2014: Common Syllabus for all sections
 Three credits (3 cr.), Traditional Grading option only
 Course Pre-requisites: Junior standing. Pre/Co-req: BFIN322

Sections 1 and 2

Instructor: Dr. Suzanne Tilleman – GBB 369
 Office Hours:
 T/H 8:30 - 9:30 AM
 Other times by appointment

Telephone: (406) 243-2915
 Email: suzanne.tilleman@business.umt.edu
 Class Location: 1. GBB L14; TH 9:40-11:00 AM
 2. GBB L14; TH 11:10 AM-12:30 PM
You are expected to attend the section for which you are registered

Class Web Page: UOnline (Moodle; <http://umonline.umt.edu>)

School of Business Administration Mission Statement

The University of Montana's School of Business Administration is a collegial learning community dedicated to the teaching, exploration, and application of the knowledge and skills necessary to succeed in a competitive marketplace.

School of Business Administration / Assessment and Assurance of Learning

As part of our assessment process and assurance-of-learning standards, the School of Business Administration (SoBA) has adopted the following learning goals for our undergraduate students.

- Learning Goal 1: SoBA graduates will possess fundamental business knowledge.
- Learning Goal 2: SoBA graduates will be able to integrate business knowledge.
- Learning Goal 3: SoBA graduates will be effective communicators.
- Learning Goal 4: SoBA graduates will possess problem solving skills.
- Learning Goal 5: SoBA graduates will have an ethical awareness.
- Learning Goal 6: SoBA graduates will be proficient users of technology.
- Learning Goal 7: SoBA graduates will understand the global business environment in which they operate.

Course Objectives:

This course involves business strategy, which is concerned with answering the question: **"Why are some organizations more successful than others?"** With that in mind, we first analyze the external environment and the firm's unique features, then consider measurement tools, and finally investigate interrelationships between firms within industries. The culmination of the course is a comprehensive, well-reasoned strategic recommendation for a business.

By the end of this course, you will be able to:

- Assess an industry to determine its attractiveness
- Evaluate a business using specific analytical techniques and frameworks
- Understand how to compare and choose among strategic alternatives

Course Format and Expectations:

1. MGMT 426 is fast paced. Our class time will be devoted to lecture, discussion, and case analysis.
2. Preparation expected before class:
 - All reading and assignments for the day have been completed,
 - You have given thought to the topics to be discussed,
 - You are prepared with questions about *relevant* issues you want to discuss, explore, or challenge.
 - All students must practice academic honesty. Academic misconduct is subject to an academic penalty by the course instructor and/or disciplinary sanction by the University. All students need to be familiar with the Student Conduct Code. The Code is available for review online at http://life.umt.edu/vpsa/student_conduct.php
 - Laptop computers may be used for note taking in class, but not for e-mailing, stock trading, gaming, or other non-class activities. If not used appropriately, a student risks losing the privilege to use electronics for the rest of the semester. Students are expected to abide by the SoBA Code of Professional Conduct <http://www.business.umt.edu/Soba/SoBAEthics/CodeofProfessionalConduct.aspx>.
3. Electronic devices must be turned to silent during class time.
4. The University of Montana assures equal access to instruction through collaboration between students with disabilities, instructors, and Disability Services for Students. If you think you may have a disability adversely affecting your academic performance, and you have not already registered with Disability Services, please contact Disability Services in Lommasson Center 154 or 406.243.2243. I will work with you and Disability Services to provide an appropriate modification. Please contact me within the first couple of weeks to arrange for accommodations.

Readings:

- Mastering Strategy: Workshops for Business Success. Braun, M.R. & Latham, S.F. The text is available through the bookstore and online. Online you can purchase a digital copy if you prefer.
- Moodle – Additional resources are posted on our MoodleRooms site. Typically, they are PDF files.
- Harvard Cases - Students purchase the four cases from the Harvard Business Publishing site. The link <https://cb.hbsp.harvard.edu/cbmp/access/39789618> will take you to my electronic course pack for the cases used specifically in this course. The total cost should be \$15.80
- Wall Street Journal – Subscription is required, at the reduced student rate the cost should be \$15.

Assignments, Evaluation, and Grading:

Seventy percent of your grade individually determined (participation, exams, and cases). The remaining thirty percent of your grade is determined by group performance (presentations). The breakdown of the evaluation is as follows:

Participation - Professor assessed	10%
Participation - Peer assessed	10%
Exam 1	20%
Exam 2	20%
Case Quizzes	10%
External Analysis	Formative assessment
Internal Analysis	Formative assessment
Strategic Recommendation	(Presentation 10% + Content 20%) = 30%
Total	100%

Attendance:

Students who are registered for a course but do not attend the first two class meetings may be required by the instructor to drop the course. This rule allows for early identification of class vacancies to permit other students to add classes. Students not allowed to remain must complete a drop form or drop the course through CyberBear to avoid receiving a failing grade. Students who know they will be absent should contact the instructor in advance.

Attendance is not required, however, missed or late work will not be accepted. I may excuse brief and occasional absences for documented reasons of illness, injury, family emergency, or participation in a University sponsored activity. (For example, field trips, ASUM service, music or drama performances, and intercollegiate athletics.) I will excuse documented absences for military service and mandatory public service.

Participation:

Class participation is a function of preparation, skills, attitude, and a willingness to share one's ideas with the class. Frequent and ongoing evaluation will be made in this area, and credit will be given for progress over the term. It is difficult to score well in Participation if a student misses more than a couple of classes.

Comments in Class

Simply attending class is necessary but not sufficient. This course has a large case component and thus requires more of students than a conventional, lecture-based course. Not only should students be familiar with the fundamental concepts presented in the accompanying text for each class, but even more importantly, they should also be intimately familiar with the details of the case. You should identify the critical problems presented in the case, calculate and assimilate appropriate financial figures, generate and evaluate alternate courses of action, and be able to select and defend your choice. This course prepares you for a managerial career, in which you will do these same tasks, albeit in significantly more detail. Please bring all case materials, including notes, calculations, and/or outlines you've generated during your preparation, to class. Keep in mind while analyzing cases that there is

no single right answer, but some answers are better than others. To find those, apply strategic concepts and critical thinking to the situations presented.

You may be 'cold-called' upon to state your major conclusions and then to provide evidence and analysis in support. Even if the situation appears ambiguous, it is important to examine data, reasons, and assumptions that make some answers better than others. Managers usually have limited information or face ambiguous situations when making decisions. For class discussion you will be expected to draw from all the relevant readings and class discussions to date. Also, please respectfully listen to your classmates and suggest supporting or alternative views. Thoughtful debate is highly encouraged. I will not assign participation scores every day, rather I am looking for comments that contribute to discussion or even better substantially moves discussion forward, such as by applying relevant frameworks, solving problems, providing alternate interpretations. I may occasionally give out a "gold star" in class when discussions are taken to a new level.

Peer Assessed Participation

Team members are required to evaluate each other on group participation. Each student will have 100 points to distribute among the members of their group including themselves, based on how they felt the other members of the group participated in the group process. This evaluation is **due by 5 pm of Monday, December 14.**

Finally, if a team member is not performing, the group may agree to remove that member. This may be done only after consulting with the professor and making repeated attempts to motivate the team member. A team member who is removed from a team must complete the assignments individually and forfeits one-half of the possible course participation points.

Potential for Extra Credit

Taking a pre/post survey on-line in the first week of class and again in the last week of class. I will not know your responses, just whether you take it both pre and post and the timing of when you take it. I will give you extra credit participation points if you choose to participate in the survey. The survey is available at https://umt.co1.qualtrics.com/SE/?SID=SV_7NYzLdXOOm8Gm9 It does require you to install the Inquisit Web Plug-In, you will be prompted to install it when you follow the link.

Major Assignments

1. **Exams:** Class exams are on **October 22**, and **November 17**. This will cover all materials through that date. Anything assigned, stated, or written on board or PowerPoint slides may be on the exam. Students arriving more than 15 minutes late will not be permitted to take the examination and will receive no points. Once you arrive to take the examination, you will not be allowed to leave the room until you are finished. All questions regarding examination scoring must be raised with the instructor within one week of posting grades. University and college guidelines governing all forms of academic dishonesty will be strictly enforced. An "incomplete" grade or extra credit assignments will not be given as a remedy for a poor or failing grade. If a student misses an exam, he/she may take a **cumulative** make-up exam during the scheduled final exam time for the class. You may choose to take the make-up exam in

replacement of a low exam score, but whatever you score on the cumulative make-up exam will replace the previous exam score even if it is a lower score!

2. **Presentations:** Teams present thrice, the first and second presentations provide an opportunity for the students to focus on the situation and receive feedback without a predetermined strategy. The third presentation will very quickly discuss the situation, but will mainly focus on the strategy and implementation for the recommendation. See the Strategic Plan handout for more details on this group project. The first two presentations are not scored, but feedback is given so that students may perform their best on the final presentation.
3. **Case Quizzes:** In order to assess your case preparation, short quizzes will be given in Moodle. They must be completed prior to the beginning of class on the day we discuss the case. There are no make-up quizzes.

Please find a detailed class schedule on the next page.

Other Information

EMAIL: According to University policy, faculty may only communicate with students regarding academic issues via official UM email accounts. Accordingly, students must use their umontana or umconnect emails. Email from non-UM accounts will likely be flagged as spam and deleted without further response. To avoid violating the Family Educational Rights and Privacy Act, confidential information (including grades and course performance) will not be discussed via phone or email.

About the Professor

Suzanne is a Montana native who is thrilled to join SoBA. Prior to earning her PhD from the University of Oregon, Suzanne worked in industry for seven years and taught at Montana State University-Northern for four years. Her industry experience includes working for General Electric, Exxon, and Monsanto as an engineer and marketing manager. Additionally, she was instrumental in the creation of the Montana Cooperative Development Center, a state-wide resource for cooperatives. After graduating with a Bachelor of Mechanical Engineering from Georgia Tech, Suzanne earned her Master's of Business Administration from Tulane University. Her research interests include organizational theory and strategy, regional business clusters, and social and sustainable entrepreneurship. In addition to her research, Suzanne has received teaching awards from the University of Oregon College of Business, U.S. Association of Small Business and Entrepreneurship, and the University of Montana's School of Business Administration. Her research has been published in *Journal of Business Research*, *Journal of Industrial Ecology*, and *Long Range Planning*.

DETAILED CLASS SCHEDULE

Subject to change - changes will be announced in class and on through Moodle.

**MS = Mastering Strategy textbook; HC = Harvard Case; MD = Posted on Moodle
! = Required reading; * Recommended reading**

Date	Topic	Reading Assignments (Complete Before Class)	
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1. Sep 1	Introduction & Overview		
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2. Sep 3	Strategy	MS	!Workshop 1: Strategy Defined
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CLASS PREPARATION

Find two companies; One company that made an appropriate trade off in order to be consistent with its larger strategy, (see Southwest, pg. 8, example) and one company that failed to make a tradeoff and confused its strategy

3. Sep 8	Case Method & Research Resources	MS	!Workshop 2: Understanding the Business Climate
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CLASS PREPARATION

Find an industry that is undergoing significant change right now; define the core assets and activities, how it is threatened, the type of change, and something a company in that industry could do to mitigate the change

Determine Business Plan Team Members & Email to Professor

4. Sep 10	Case analysis	MD	!Robin Hood
		MD	*How to Read a Financial Report

Company Determination Due; Email Professor the name of company/division, & plan for obtaining financial data and why you selected this company

5. Sep 15	External Environment	MS	!Workshop 3: SWOT & Generic Strategies
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CLASS PREPARATION

Use the Generic Strategy Matrix to look at the grocery industry;

- Give an example of a local or national grocery business that occupies one of the four quadrants
- Give an example of one grocery business that might be SITM (Figure 3.2 offers the framework)

6. Sep 17	Susanne Caro, Business Librarian	<u>Meet in Buckhous room in the Mansfield Library</u>	
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7. Sep 22	External Environment cont.	MS	!Workshop 4: The Five Forces
		MD	* Purdue Five Forces Worksheet

8. Sep 24	External Environment cont.	MS MD	!Workshop 5: The Value System !Gadiesh, Orit; Gilbert, James L.. "How to Map Your Industry's Profit Pool." Harvard Business Review, May/Jun98, Vol. 76 Issue 3, p149-162
	<i>If time allows, teams will be given time to work and ask questions</i>		
9. Sep 29	Case analysis	HC	!Punch Up in the Potash Industry (A) – The Fertilizer Hits the Fan
	<i>If time allows, teams will be given time to work and ask questions</i>		
10. Oct 1	in-class video Discontinuous Innovation, Clayton Christensen In class worksheet (call number for video and copy of worksheet posted on Moodle)	MD	* Evans, Philip; Wurster, Thomas S.. "Getting Real about Virtual Commerce" Harvard Business Review, Nov/Dec99, Vol. 77 Issue 6, p84-94
11. Oct 6	Presentations on External Analysis		
12. Oct 8	Presentations on External Analysis		
13. Oct 13	Internal Analysis	MS	!Workshop 6: The Value Chain Handout of case (TBD)
14. Oct 15	Internal Analysis cont.	MS	!Workshop 7: The Core Competence
<u>CLASS PREPARATION</u>			
Draw a competency tree for a company you are familiar with; see Figure 7.1 and 7.2 for guidance			
15. Oct 20	Internal Analysis cont.	HC	!Patagonia
16. Oct 22	Exam 1		
17. Oct 27	Presentations on Internal Analysis		
18. Oct 29	Presentations on Internal Analysis		
19. Nov 3	Business-level Strategy/Generic	MD MD	!Kumar, Nirmalya. "Strategies to Fight Low Cost Rivals" Harvard Business Review, Dec2006, Vol. 84 Issue 12, p104-112 !W. Chan Kim; Mauborgne, Renée. "Blue Ocean Strategy: From Theory to Practice" California Management Review, Spring2005, Vol. 47 Issue 3, p105-121
20. Nov 5	Corporate-level Strategy	MS MD	!Workshop 8: Diversification !Marks, M.L.; Mirvis, P.H.; Brakjovich, L.F.; "Making Mergers and Acquisitions Work" Academy of Management Executive, May 2001, Vol. 15 Issue 2, p80-92

21. Nov 10	International Strategy	MS MD MD MD	!Workshop 9: International Strategy ! Porter, Michael E.. "The Competitive Advantage of Nations" Harvard Business Review, Mar/Apr90, Vol. 68 Issue 2, p73-93 * Ghemawat, Pankaj. "Managing Differences" Harvard Business Review, Mar2007, Vol. 85 Issue 3, p58-68 * Aron, Ravi; Singh, Jitendra V.. "Getting Offshoring Right" Harvard Business Review, Dec2005, Vol. 83 Issue 12, p135-143
22. Nov 12	Case analysis <i>If time allows, teams will be given time to work and ask questions</i>	HC	!Bombardier Transportation and the Adtranz Acquisition
23. Nov 17	Exam 2		
24. Nov 19	Measuring Strategy	MS MD	!Workshop 10: Measuring Strategic Success ! Kaplan, Robert S.; Norton, David P.. "Using the Balanced Scorecard as a Strategic Management System" Harvard Business Review, Jul/ Aug2007, Vol. 85 Issue 7/8, p150-161
25. Nov 24	Case analysis	HC	!Boston Lyric Opera
26. Nov 26	HOLIDAY		
27. Dec 1	Case analysis <i>If time allows, teams will be given time to work and ask questions</i>		Handout of case (TBD)
28. Dec 3	Strategic Plan Presentations		
29. Dec 8	Strategic Plan Presentations		
30. Dec 10	Strategic Plan Presentations		

Final exam time is reserved for cumulative make-up exams

Section 1	T/H 9:40 AM – 11:00 AM	Final time = 10:10 AM - 12:10 PM Wednesday, December 16
Section 2	T/H 11:10 AM – 12:30 PM	Final time = 10:10 AM - 12:10 PM Thursday, December 17

If students want to take their final with a different section please let me know as soon as possible so that I have enough exams and a large enough classroom

Strategic Plan Instructions MGMT 446

The business plan project is the centerpiece of this course and will require you to integrate and apply approaches and tools learned in the course to an actual existing business situation. The firm you choose can be a stand-alone entity or a business unit of a larger corporation. It can be public or private. The plan must be realistic and rigorous, incorporating the real world context, numerical calculations, and conceptual analysis. The plan must be the result of your team's original thought process. You cannot recommend a strategic initiative the business is already enacting. A good plan will be logically consistent and show (realistic) profitability or reduction in losses.

Requirements

Group Composition: This is a group project, with groups consisting of 4 or 5 people. Consider creating a group that includes people with different skill sets and life experiences since that will provide more depth in their areas of expertise as well as provide a broader view of the project as a whole. Team members are assigned roles: External analysis lead, Internal analysis lead, Financial analysis and strategic projections lead, and Strategic recommendation lead. If there are 5 team members then the financial role is split for the second and third presentations.

I recommend turning in an Initial Team Charter to the professor. The template is posted on the Blackboard site.

You are required to evaluate your group members to prevent "free-rider" problems. If you fail to evaluate group members at the end of the semester you forfeit the team participation points awarded to you by your teammates. If a team member is not performing, the group may agree to remove that member. This may be done only after consulting with the professor and making repeated attempts to motivate the team member. A team member who is removed from a team must complete the assignments individually and forfeits one-half of the possible course participation points.

Presentation Format: Presentations are done by the lead team-member(s). The Financial analysis lead will present with both the Internal analysis lead and the Strategic recommendation lead in the second and third presentations.

You will be graded on style, integration, coherence, flow, and structure. Wear business appropriate attire for presentations. Be concise and make trade-offs as to what to include and what to omit. Be sure to include a summary slide at the end of each presentation. Practicing your presentation beforehand is **STRONGLY** recommended. Having fun is also strongly recommended. Copies of the grading rubrics are at the end of this document.

The External Analysis Presentation is limited to 10 minutes. The Internal Analysis Presentation is limited to 10 minutes. The Strategic Recommendation Presentation is limited to 15 minutes.

Documentation Format: On the first day of each of the three presentations, teams turn in a packet of their presentation slides with any needed appendices. These slides are evaluated for content. As such make sure they contain the pertinent information. When the Strategic Recommendation slides are turned in, the previous two presentation slides are turned in with any necessary corrections.

References: Include sufficient references for statements in your plan, with footnotes and full citations listed as separate pages in the appendix (following the presentation slides). Use the Mansfield Library unabashedly and completely, especially their printed resources. Do not limit yourself to on-line resources. If you do use on-line data resources, you must provide references to these as well. Use the Wall Street Journal, Business Week, Fortune, Forbes, and other business publications.

Deadlines: Refer to the syllabus for the schedule.

External Analysis

This first presentation describes the environment in which the company operates, including industry characteristics and competitors.

This analysis should include all of the following components (points for each section are listed in parentheses after each section heading):

1. Introduction: Identify your company and, most importantly, a clear definition of the industry. Include the geographic scope of the industry and what portions of the business are to be considered.
2. Changes and trends in the environment: Discuss the economic, technological, political-legal, socio-cultural, and other trends and how they affect the industry. Ignore trends of lesser importance.
3. Complete five-forces industry analysis: Conduct a five-force analysis of this industry, making conclusions about the strength of each force and providing an overall assessment of the industry's attractiveness.
4. Analysis of existing competitors: Discuss the key success factors in this industry and assess the existing competitors (not including your company). Describe interactions between the companies and any indirect players that could change the competitive dynamics of the industry.

5. Industry segmentation and demand issues: Describe the customer/product/market segments in this industry, including differences on key dimensions. Discuss what drives customer satisfaction and loyalty and analyze how well your company is positioned and in which segments. Discuss the industry's financial performance over time.
6. Opportunities in the industry: Propose customers or segments of the industry that are not well served. Show thinking and justification for the identified opportunities.

Internal Analysis

The second presentation examines the resources and capabilities of your chosen organization. This examination should draw on data from the organization itself and reliable secondary data sources such as (but not limited to) industry reports, trade publications, and analysts' coverage to construct a credible description of the organization's resources, capabilities and commensurate constraints.

1. Introduction: Describe the core mission or objectives of your company. Explain the company's generic strategy.
2. Internal resource assessment: Analyze your company's internal resources and capabilities, including its key strengths and weaknesses. Be sure to use both organizational and secondary sources. How do its major areas (R&D, marketing, operations, human resources, information systems, financials, etc.) align with industry opportunities? What is the basis of the company's competitive advantage? Applying the Value Chain and Core Competencies frameworks. How is the value of their resources and competencies enduring? Be sure to include specific incidences or examples.
3. Financial resources: The firm's financial position determines which strategic opportunities available to you. Include key performance ratios and discuss how they compare to industry averages or competitors. Explain any expected changes in the firm's financial position.
4. Opportunities for the company: Propose better usage or leveraging of existing resources or capabilities. This may include reducing or eliminating poor performing resources. These are still not recommendations, but a process in the generation of potential actions. Show thinking and justification for the identified opportunities.

In addition to these specific topics, you will also be evaluated on research embodied in the report, citation list, and graphics.

Strategic Recommendation & Budget

The third presentation provides your recommendation for the company, along with all the relevant operational and financial details.

1. Executive Summary: Explain the nature of the business, your strategic recommendation and its rationale, and the implementation plan.
2. Strategic Alternatives and your Recommendation: Discuss the alternatives to your recommendation. Discuss your rationale for preferring this alternative over the others. Discuss your recommendation's connection to business strategies taught in class or readings and how it helps the company meet its strategic goals.
3. Implementation Plan: Develop a specific plan about how the company will implement your recommendation. Include how the attributes of your products and services will be supported by marketing activities (pricing, promotion, distribution, target marketing, etc.). Discuss any changes to the organizational structure and human resources. Describe how operations and production will be affected by your plan. Develop an Activity Map. Explain other aspects of the value chain as applicable and discuss how they will be managed. Propose and defend how the company should measure performance.
4. Financial Projections: Develop a five-year financial projection along with a narrative that provides explanations and conclusions. You will need to make reasonable assumptions – for sales revenues, advertising expenses, capital expenditures, start up costs, and other factors - be sure to be explicit about these and include them after the slide set. Include information that is relevant to the changes you suggest as it is necessary in the income statement/ balance sheet. If you are starting a new company a statement of cash flows may be necessary. Financial projections should extend five years. Make sure all numbers are consistent with the marketing, operational, and managerial plans. Include key performance ratios and discuss how they compare to industry averages.
5. Risk Assessment and Contingency Plans: Discuss 3 significant risks that could impact your company's performance. Propose contingency plans for the company should one or more of these risks occur.
6. Conclusion: Summarize the key points of the plan and motivate the key decision makers to proceed.

Possible Approaches

Here are several possible approaches you may take in your plan. You do not need to be limited by this list, but they are good places to start.

1. Start ups: This plan would involve an existing company that is extremely small, busy, or has not done much strategic planning. The emphasis will be on assessing the company's

performance, defining the core mission and strategic focus, and establishing a set of implementation priorities.

2. New products and/or new markets: This plan would involve deploying a new product into an existing market, existing products into new markets, or new products into new markets (the most daunting task). The emphasis will be on determining the viability of the products and markets, creating realistic projections, and fitting these new initiatives with the rest of the business.
3. Realignment: This plan would involve adjustments to a company's current position so that it better aligns with anticipated environmental changes. The emphasis will be on assessing past/current performance, proving realignment is necessary, and creating organizational, market-based, financial, resource, and other recommendations to put the company on a more profitable path.
4. Overhaul: This plan would involve a wholesale change in the way the company operates. The emphasis will be on why such a drastic change is required, how it will be accomplished, and the financial, managerial, and market implications of the changes.

A Final Note

Please contact me sooner rather than later if you have any questions on your plan. Problems that are easily solved in week three can be insurmountable two days before the plan is due. Meet regularly with your group and have a realistic timeline for the overall project.

External Analysis Presentation Evaluation

Group Name: _____

Team Members: _____

Section
Content <ul style="list-style-type: none"> • Appealing and convincing introduction • Good discussion of changes and trends in general external environment PESTEL • Good discussion of changes and trends in industry <ul style="list-style-type: none"> ○ 5-forces attractiveness ○ Industry segments and demand issues ○ Existing competitors ○ Value System or Profit Pool • Discussion of opportunities in the industry? • Strong evidence of research (citations where appropriate?) • Q&A – clear, concise, well supported answers
Delivery <ul style="list-style-type: none"> • Professionalism • Continuity and flow • Effective pace and use of time • Responsiveness to questions
Visual Aids <ul style="list-style-type: none"> • Visual aids support conclusions and presentation style <ul style="list-style-type: none"> ○ Slides are informative & appealing, flows logically, well practiced • Appropriate level of detail
Total

Greatest strength of the presentation was:

Most important area in which this presentation could have been strengthened:

Internal Analysis Presentation Evaluation

Group Name: _____

Team Members: _____

Section
Content <ul style="list-style-type: none"> • Appealing and convincing introduction (Exec. Summary) <ul style="list-style-type: none"> ○ Why change at all? • Internal resource assessment <ul style="list-style-type: none"> ○ Strengths & Weaknesses ○ Generic Strategy ○ Core Competencies ○ Value Chain ○ How do functional areas match opportunities • Financial resource assessment <ul style="list-style-type: none"> ○ Key performance ratios compared to industry ○ Expected changes in financial position? • Opportunities for company (still not recommendations, yet several areas for improvement) • Strong evidence of research (citations where appropriate?) • Q&A – clear, concise, well supported answers
Delivery <ul style="list-style-type: none"> • Professionalism • Continuity and flow • Effective pace and use of time • Responsiveness to questions
Visual Aids <ul style="list-style-type: none"> • Visual aids support conclusions and presentation style <ul style="list-style-type: none"> ○ Slides are informative & appealing, flows logically, well practiced • Appropriate level of detail
Total

Greatest strength of the presentation was:

Most important area in which this presentation could have been strengthened:

Strategy Recommendation Presentation Evaluation

Group Name: _____

Team Members: _____

Section	Points
Content <ul style="list-style-type: none"> • Appealing and convincing introduction (Exec. Summary) <ul style="list-style-type: none"> ○ Why change at all? • Good discussion of strategic alternatives • Good explanation for selection among alternatives <ul style="list-style-type: none"> ○ Why this one? Why is it a good fit? • Good discussion of implementation plan <ul style="list-style-type: none"> ○ Product or service attributes/ organizational changes considered ○ Activity Map ○ Use of framework (value chain, bus-level or corp-level strat?) ○ Performance measurement • Good discussion of financials <ul style="list-style-type: none"> ○ 5-year projection (consistent with recommendation?) ○ Key performance ratios compared to industry • Discuss risk assessment and contingency plan • Strong evidence of research (citations where appropriate?) • Q&A – clear, concise, well supported answers 	/ 200
Delivery <ul style="list-style-type: none"> • Professionalism • Continuity and flow • Effective pace and use of time • Responsiveness to questions 	/ 50
Visual Aids <ul style="list-style-type: none"> • Visual aids support conclusions and presentation style <ul style="list-style-type: none"> ○ Slides are informative & appealing, flows logically, well practiced • Appropriate level of detail 	/ 50
Total	/ 300

Greatest strength of the presentation was:

Most important area in which this presentation could have been strengthened: