



# LINCOLN UNIVERSITY

## BA 490 B – Business Strategy and Decision Making for Finance Management

### COURSE SYLLABUS

Fall 2019

**Instructor:** Prof. Marshall J. Burak, DBA

**Lecture Schedule:** Wednesday, 12:30 PM – 3:15 PM

**Credits:** 4 units (3 units / 45 lecture hours + 1 unit individual research project)

**Level:** Mastery 2 / Research (M2R)

**Office Hours:** Wednesday, 11:00 AM - 12:30 PM  
Room 307

Additional office hours by appointment.

**e-mail:** [mburak@lincolnuca.edu](mailto:mburak@lincolnuca.edu)

**Textbooks:** Glo-bus Business Simulation Value-Pak  
Available with Simulation Registration

**Prerequisites:** *This course is to be taken after completion of all required 300-level courses and at least three elective courses*

**Last Revision:** August, 2019

### CATALOG DESCRIPTION

Students are expected to develop an in-depth understanding of the concepts and application of the opportunities and risks that confront a company seeking to grow globally. Emphasis is on the practical application of strategic concepts to both corporate and business level operations and managerial decision-making. Readings and case materials are reinforced with participation through written tests, research papers and oral presentations. This is the MS program capstone course for the Finance management concentration. A one unit written research project and its oral presentation are required for the course. (4 units)

### DETAILED COURSE DESCRIPTION

Today's business firms develop, grow and operate in an extremely complex and often fiercely competitive marketplace. Decisions that managers make must, therefore, be based on the most complete and current information available about their markets, products, technology and resource availability. Such decisions require inputs from many sources and disciplines and must,

by virtue of their complexity, draw upon the skills, knowledge and experience of the entire management team.

Successfully competing in a rapidly evolving global business environment depends upon management creating a strategic focus and coherent plan for growth, innovation and superior financial performance. Ultimately, it is management's careful consideration and blending of information, opportunity and resources that form decisions that have strategic value in terms of the continuing successful development of the firm.

### **EDUCATIONAL OBJECTIVES**

This course will focus on the corporation and the set of strategic factors that underlie the basis for formulating and implementing management decisions. These strategic factors have both internal and external impact on the firm in terms of influencing both the organization of the business and its outreach to and interaction with the global marketplace.

Cases will be used to illustrate how business firms develop strategic responses and management decisions to critical issues such as competitive threats, technology change, growth opportunities and financial performance.

Emphasis will be placed on the analytical techniques and tools for creating useful and valid business, market and financial information that becomes the foundation for the development of strategic management decision making.

In addition to a mid-term and final exam, students will be required to participate in a Strategic Management Simulation that involves the development and implementation of operating strategies and decisions that determine the Simulation company financial performance, operating effectiveness and growth.

A core learning experience in this course is involving students in the process and methodology used to analyze a complex business to determine and critique the company's strategies and decisions that best support and result in the successful operation and profitable growth of the company they are responsible to manage.

### **LEARNING OUTCOMES**

The combination of assignments discussed under Learning Objectives are designed to provide measurable student learning outcomes in the following business and management areas:

- 1) leadership skills;
- 2) collaboration and team work;
- 3) analytical skills;
- 4) financial management skills;
- 5) operations management skills;
- 6) marketing management skills;
- 7) human resource management skills;
- 8) strategic analysis and planning capabilities;
- 9) understanding of corporate social responsibility.

Course assignments given during this course will be explained in terms of these learning outcomes elements and how they are measured and calculated.

### **Learning Outcomes Matrix**

The University has developed a learning outcomes matrix that associates Institutional Learning Outcomes with Program and Course Level Outcomes. All elements of the teaching and instructional process used in this course is now associated with student learning outcomes

that are specific to this course but are also supportive of the University's Program and Institutional learning outcomes objectives.

The following table of learning outcomes identifies the BA 490A/490B course specific expectations and their relationship to supporting MS program and institutional learning outcomes objectives. An appendix has been attached to this syllabus, which provides a detailed explanation of the University's Institutional and Program learning objectives.

All student performance on assignments made in BA 490A/490B is now associated with the learning outcomes developed in the tables included in this syllabus. Most specifically, the results of the Glo-Bus simulation provide extensive and detailed student learning outcome results that are most helpful in guiding the continuing development of this course's use of educational technology, instructional methodologies and content.

As a capstone course, students are expected to demonstrate the ability to integrate a broad base of business information, apply the appropriate tools for analyzing data developed and collected, and make considered and complex strategic business plans and decisions.

### Course Learning Outcomes<sup>1</sup>

	Course LO	Program LO	Institutional LO	Assessment
1	Employ analytical techniques and tools to create valid information in support of decision-making	PLO 1	ILO 1c, ILO 2c	Simulation management game, Case study, Classroom exercise
2	Be able to identify tools and technique needed to obtain competencies, capabilities, and resources required for the implementation of business strategy	PLO 2	ILO 1c, ILO 2c, ILO 4c	Simulation management game, Case study, Classroom exercise
3	Formulate and implement strategic responses to change in external and internal environment	PLO 3	ILO 2c, ILO 7c	Simulation management game, Case study, Classroom exercise
4	Define data-driven corporate development objectives that allow to achieve and sustain competitive advantage	PLO 4	ILO 4c, ILO 5c, ILO 6c	Simulation management game, Case study, Classroom exercise, Individual project
5	Evaluate and effectively communicate potential global business opportunities and risks	PLO 5	ILO 4c, ILO 5c	Simulation management game, Case study, Classroom exercise

<sup>1</sup> Detailed description of learning outcomes and information about the assessment procedure are available at the [Center for Teaching and Learning](http://ctl.lincolnuca.edu) website (ctl.lincolnuca.edu).

6	Be able to lead and to be a productive member of a project team	PLO 6	ILO 4c, ILO 5c	Individual project
7	Manage corporate social responsibilities issues within a context of strategic development	PLO 7	ILO 3c	Simulation management game, Case study, Classroom exercise

## INSTRUCTIONAL METHODOLOGY

### **This is a direct classroom instruction course.**

This course emphasizes a realistic look at how moderate to very large size firms develop and make strategic decisions. The approach includes an appraisal of the strengths, weaknesses and opportunities facing companies and uses real business cases as the basis for analyzing and evaluating company responses. Students are expected to have read the text and case assignments prior to class meetings. Class discussions will be based on an examination of the assigned text material and illustrative cases. The assigned textbook is to be considered a basic resource providing a presentation and explanation of strategic business concepts and the formative factors that guide and determine management decision-making. The assigned textbook readings parallel case assignments and class discussion topics. It is important that both the reading and case assignments are completed in preparation for productive class discussions.

In addition to the case assignments, students will be organized into teams and participate in the operation of a company through an automated on-line simulation program. Student teams will be required to make repetitive decisions regarding key strategic elements of the company based on their interpretation of the firm's competitive environment, financial and operating ratios, the economic climate, and periodic problems that arise during the simulation.

Students will receive a detailed explanation of the operating characteristics of the simulation, the cost of and means of obtaining an access card required to participate in the simulation, and the nature of the operating reports the teams will receive and the nature of the decisions the teams will be required to make.

## READING AND PROBLEM ASSIGNMENTS

Reading assignments from the text, *Strategy: Core Concepts and Analytical Approaches* provide background concepts and analytical tools useful in evaluating assigned cases.

Case assignments are used primarily for purposes of providing practice in the development of useful information forming the basis of management strategies and decision-making.

Assignments and projects require students to actively use resources of the library. Detailed guide to business *resources of the library* as well as the description of Lincoln University approach to *information literacy* are available at the [Center for Teaching and Learning](http://ctl.lincolnuca.edu) website (ctl.lincolnuca.edu).

## COURSE REQUIREMENTS

Successful completion of this course requires:

1) an in-depth analysis of a business Case including an analysis of the company's market position, strategic initiatives and focus, strengths, weaknesses, opportunities, technology, competitive environment, resources and financial condition;

2) active participation in the Strategic Management Simulation Game.

Teams will be formed for both of these requirements. Each team will have a different case assigned for their analysis. The simulation game operates with all teams managing the same company but is a competitive exercise. Teams operating the Simulation Company will be judged on their success or failure relative to competing teams. At the beginning of this course instructions will be provided related to these assignments including:

1) development of the case analysis, assessment of the company's strategies, key decisions, financial condition and performance, evaluation of the company's successes and failures, formation of a set of recommendations and the submission of a completed team project report;

2) the access and operating requirements for the Simulation.

Time will be set aside during my course to consult with and support each team as they undertake their project assignment and engage in making company decisions in the Management Strategy Simulation. The final team case report requires an oral presentation that I will schedule and a written report due to me by Wednesday, December 4th, 2019.

**MS Degree Program students are also required to develop and present an individual case based research study required for the additional one unit of credit. This individual report is due on December 4th, 2019.**

## COURSE STANDARDS

A. Students are expected to attend each class meeting and be prepared to discuss the assigned text and case materials. Students who come to class late will not be admitted until the break period. Every member of the class is expected to participate in discussions surrounding the assigned chapter and case content.

B. Each student is required to purchase the course textbook and to be an active participant in both the team case analysis and Simulation experience.

## BASIS FOR GRADING

A. The Comprehensive Case Analysis assignment requires student teams to select a case to work on from a list I will provide. Once the team has selected a case, they should begin to organize their effort and assign individual members of the team specific tasks and give me a list of the team's members and their individual assignments as soon as it is complete. During the semester I will monitor each team's progress. Grades for the completed project will be based on the quality and completeness of the case analysis, the effectiveness of the team's oral presentation, and the organization and content of their written report including appropriate documentation and identification of sources and the correctness of spelling and grammatical usage of the English language.

B. The Team Simulation exercise will be graded based on:

1) the rationale behind the periodic decisions made by the team;

2) the company performance in comparison to the achievements of competing teams;

3) the demonstrated ability of the team to work together in determining their strategic decisions;

4) the team's performance relative to making Simulation decision inputs in an on-time and complete manner.

## C. Basis for Grading

Team Case Oral Presentation	20%
Team Case Written Presentation	20%
Strategic Management Simulation	20%
MS Written Case Project	25%
Class Participation	<u>15%</u>
	100%

**\*Note: The grade component earned for class participation includes evidence that each student has registered and paid for the Glo-Bus Simulation Value-Pak, which includes registration for the simulation, and the course required text.**

## D. Calculation of Course Grades

Each exam and the project have a total possible point value of 100. Course grades are calculated based on the sum of the points earned on the case assignment and the simulation exercise times their respective weight. Class participation is based on each student's preparation and involvement in class discussion of the text cases assigned times its respective weight. The weighted semester point count earned by each student establishes his or her course grade.

Letter grades are based on the following scale: A, 90-100; B, 80-89; C, 65-79. Course grading is curved depending on the overall class performance which influences the inclusion of a – or + related to the letter grade.

**COURSE OUTLINE AND ASSIGNMENTS**

<u>Date/Day/Time</u>	<u>Topic</u>	<u>Reading &amp; Case Assignments</u>
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**Part I****Concepts and Techniques for Crafting and Executing Strategy****Section A: Introduction and Overview**

Aug. 21, Wed. 12:30-3:15pm	What is Strategy and Why is it Important? Explanation of the Course Requirements	Text: Chapter 1
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Aug. 28, Wed. 12:30-3:15pm	Charting a Company's Long-Term Direction Team Development for Case Study	Text: Chapter 2
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**Section B: Core Concepts and Analytical Tools**

Sept. 4, Wed. 12:30-3:15pm	Evaluating a Company's External Environment	Text: Chapter 3 Case: Fitbit, Inc.
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Sept. 11, Wed. 12:30-3:15pm	Evaluating a Company's Resources and Ability to Compete Successfully	Text: Chapter 4 Case: Costco Wholesale
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**Section C: Crafting a Strategy**

Sept. 18, Wed. 12:30-3:15pm	The Five Generic Competitive Strategy Options Team Oral and Written Case Planning Meetings	Text: Chapter 5
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Sept. 25, Wed. 12:30-3:15pm	Supplementing the Chosen Competitive Strategy	Text: Chapter 6
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Oct. 2, Wed. 12:30-3:15pm	Strategies for Competing Internationally or Globally	Text: Chapter 7 Case: Starbucks in 2018
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<b>Oct. 9, Wed. 12:30-3:15pm</b>	<b>No Class Meeting</b>	
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Oct. 16, Wed. 12:30-3:15pm	Discussion of Team Case Assignment Consultation with Teams on the Simulation	Guide to Case Analysis (Provided) Case: Mattel, Inc. in 2018
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Oct. 23, Wed. 12:30-3:15pm	Diversification Strategies	Text: Chapter 8 Case: The Walt Disney Co. in 2018
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Oct. 30, Wed. 12:30-3:15pm	Team Simulation and Case Study Discussion and Planning Session	Case: Vail Resorts
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Nov. 6, Wed. 12:30-3:15pm	Strategy, Ethics, and Social Responsibility	Text: Chapter 9 Case: Profit in Pain
Nov. 13, Wed. 12:30-3:15pm	Building an Organization Capable of Good Strategy Execution Discussion of Strategic Financial Analytical Techniques	Text: Chapter 10
Nov. 20, Wed. 12:30-3:15pm	Managing Internal Operations: Actions that Promote Good Strategy Execution Corporate Culture and Leadership-Keys to Good Strategy Execution	Text: Chap. 11 Text: Chap.12
Nov. 27, Wed.	<b>No Class Meeting (Fall Recess)</b>	
Dec. 4, Wed. 12:30-3:15pm	<b>Final Simulation Review Student Team Case Analysis Presentations</b>	

**Comprehensive Team Case Projects and MS Individual Case Projects are Due in  
hardcopy on Dec. 4, 2019**



## INDIVIDUAL RESEARCH PROJECT (1 unit)

Each student registered for a 400-level course must complete a one-unit research project in addition to the coursework described in this syllabus. The specific topic will be assigned by the instructor.

The project requires 45 hours of independent study with regular consultations in accordance with the schedule determined by the instructor. The project work results in a written report (not less than 15 pages; APA style) and an oral presentation during the class session.

Evaluation of the student's work on the Individual Research Project will be done using the following rubric:

<b>WRITTEN REPORT</b>				
	<i>Exceeds Standards</i>	<i>Meets Standards</i>	<i>Does Not Meet Standards</i>	<i>Not Present</i>
<i>Research Problem Statement</i>	The statement of a research problem is crystal clear, novel and thought provoking	Clearly and concisely identifies a research problem	The statement of a research problem is incomplete, lacking precision.	The statement of a research problem is absent.
<i>Organization</i>	The report is logically organized; ideas are exceptionally well-developed and support a thoughtful and engaging conclusion.	The development of ideas is present; the conclusion is effective and directly addresses the original thesis.	Organization is confusing, disjointed, and inconsistent; ideas, if present, are not developed; the conclusion is vague and/or does not address the original thesis.	The report lacks organization
<i>Sources and formatting</i>	A variety of high-quality sources is used; all factual claims are supported with citations.  The report follows the APA style guidelines.	A few high-quality sources are used; majority of factual claims are supported with citations  The report mostly follows the APA style guidelines.	Sources used are of a questionable quality; factual claims are not supported.  Use of APA style is inconsistent.	Sources are not identified or of a poor quality; factual claims are unsubstantiated.  The report is poorly formatted

<b>PRESENTATION</b>			
	<i>Exceeds Standards</i>	<i>Meets Standards</i>	<i>Does Not Meet Standards</i>
<i>Style and Organization</i>	Presentation is clear, confident and fully engaging; the use of visual aids enhances its effectiveness; the presentation is well timed and structured.	Presentation is clear; the use of visual aids is not detrimental to audience engagement; all necessary components are given appropriate time.	Presentation lacks clarity, no attempt is made to engage the audience; visual aids are haphazard and distracting; lack of structure results in an inefficient use of time.
<i>Questions and Answers</i>	Student demonstrates extensive knowledge of the topic by providing confident, precise and appropriate responses to all audience questions.	Student demonstrates knowledge of the topic by responding adequately to questions of the audience.	Student demonstrates lack of knowledge of the topic by responding inaccurately and inappropriately to audience questions.