Department of Management
“Developing tomorrow’s leaders today”
MANAGEMENT 4322 - 015
Organizational Strategy

Professor: M. Ann McFadyen, Ph.D. mcfadyen@uta.edu
Telephone Number: 817 272 3166 http://www.uta.edu/goolsby/faculty/professors/ann-mcfadyen.php

Time and Place
Tuesday 2:00pm – 4:50pm Synchronized Online – Teams

Description of Course Content
Strategic Management, as a field of study, considers the overall direction of an enterprise. The focus of this Organizational Strategy course is on corporate level and business unit-level strategy formulation and implementation. It requires the application of the knowledge and techniques learned in the earlier courses in an integrated fashion. The topics to be covered include the relationship of organizations to their environments, organizational mission and objectives, systematic analysis of the external and internal environments of the firm using various theoretical frameworks, corporate-level and business-level strategies, the role of organizational structures and systems in the context of strategy formulation and implementation and the mechanisms for monitoring and evaluating the effectiveness of strategic decisions and their implementation.

This course attempts to encourage an integrated multifunctional perspective of the organization and its environment to develop skills necessary and appropriate to corporate-level and divisional-level policy analysis, formulation, and implementation.

Learning Objectives for the course
1. Develop and reinforce a general management point of view that recognizes overall long-term and short-term organizational goals and multiple stakeholders.
2. Synthesize the diverse strands of functional disciplines learned in earlier courses into one integrative perspective.
3. Explain the three major strategic management elements: strategy analysis, strategy formulation, and strategy implementation.
4. Demonstrate the influence of global competition on firm strategy and performance.
5. Develop the ability to analyze internal and external environments of the business using tools such as five forces analysis, value chain analysis, and resource-based analysis.
6. Develop the ability to communicate the results of one’s analysis as well as to develop specific actionable recommendations.
7. Develop sensitivity to the ethical and social dimensions of corporate actions.
8. Assess a firm’s ability to develop and sustain a competitive advantage over its rivals.
Student Learning Outcomes
After completing the course, the student will be able to:
(1) Analyze a business situation
(2) Identify significant problems
(3) Propose and justify explicit realistic, effective, and efficient solution.

Required Textbooks and Other Course Materials
2. The Wall Street Journal is our “real world” textbook. UTA has complimentary access to the WSJ. This is a very nice resource, particularly the career features.
   Simply go to this URL to access your subscription: WSJ.com/UTArlington
3. Selected readings from the UTA Library

Description of Assignments or Events
A. Participation Grade (20%)
Your participation grade is a critical element of this class, comprising 20 percent of your overall grade. You owe yourself and your fellow students your presence in the classroom, your preparation of the required material, and your participation in a timely manner. It is your responsibility to have read in advance the materials that will be covered during lecture. Please come to class prepared. Please ask yourself why each reading has been assigned and how it fits into the overall course. Preparation and participation is expected and monitored. Simply attending class does not garner participation points.

Participation will be assessed in two ways. First, you are required to participate in classroom discussions. Do not be afraid to ask relevant questions in class, however, do not waste class time by not being prepared or asking questions which distract us from covering the material. Second, I will periodically ask you to turn in written assignments.

Participation is graded on both the quantity and the quality of the contribution to the discussion and constitutes half of your participation grade. Additionally, attendance is mandatory for any guest lecturer with university excused absences being the only exception. Please note and remember attendance does not in any way equal participation. You have to attend to participate; however, by attending you do not garner participation points, by not attending, you may actually lose points.

B. Individual Assignments (60%)
1. **FORD – Individual Case Analysis (20%)**: Each individual is asked to prepare a case analysis on FORD (found in our text C277). The expected length of this Case Analysis is 3 – 4 pages, 1-inch all-around margins, single-spaced and Times New Roman 12-point font. Please see more information and a grading rubrics in Appendix I.

2. **Term Paper – Individual Case Analysis (40%)**: The term paper is a more in-depth analysis. Each individual is asked to choose a company to prepare a comprehensive case analysis (publicly traded firms are best as information is more readily available). The initial *one-page* internal overview of the company is due before class September 8, (by email). Only one person may analyze a particular organization. Please include the following:
   - A Brief History of the company
   - Mission Statement
   - Purpose
Top Management Team
What the company does best

Please choose an organization of interest and prepare a case analysis using the Case Analysis Outline at the end of this syllabus (Appendix II). Also included in Appendix II is a grading rubrics for your term paper. The overarching goal of this and all assignments in the course is for you to demonstrate your understanding and ability to apply as much of the material covered in class as possible. We are reading 27 articles and 11 chapters. Your goal is to reference as many as possible (if not all). Make sure you provide all references for your sources. Remember if something is not your own thoughts, please provide a proper reference to your source (APA format).

Cases are to be analyzed using material covered in class this semester and on courses covered prior to this course. An adequate case analysis is expected to be between 5 and 7 single spaced (12 point Time New Roman font, 1 inch margins) pages. Cover pages, table of contents, figures, graphs, picture, references, charts or other supplemental material will not be included in the overall page count. Please do not cut, copy, and paste in charts or other pictures off the web. A cases analysis outline and grading rubric are included at the end of this syllabus. Final Project due December 15.

Please read “What constitutes plagiarism” if you have any questions as to what and how to properly reference your sources: http://isites.harvard.edu/icb/icb.do?keyword=k70847&pageid=icb.page342054

C. Team Assignments
Please form 4 teams of 5 and 2 teams of 4 people. If possible, please form your own teams before class begins on August 27th, simply have one person send me an email listing your team members. We will randomly assign which team will present which case at the end of the first class.

Team Class Leader (Class Participation). Each week teams will be responsible for leading the discussion on the assigned readings. You do not need to develop a formal presentation (although encouraged and welcome), however, please prepare a plan on how you will engage others in the class for each article. Please incorporate as many of our readings and WSJ discussions as possible. In addition, your personal participation grade requires that you read and are prepared to discuss all articles each week.

Team Case (20%). We have 6 short cases. Each team is make a case analysis presentation to the class. Please remember to refer to as many of the articles and chapters covered in class. Importantly, do not be concerned nor research what the organization actually did. To be sure, the organization may have not developed the “best” strategic options. Drawing upon our readings, text, and WSJ should lead you to the best strategic alternatives for the organization. The project is worth 20% of your grade. All presentations are due November 17 at the beginning of class. Please have your team leader email me a copy of your presentation.

Cases (in our Text):
Team 1: Fresh Direct C28
Team 2: Campbell C145
Team 3: Ascena C197
Team 4: United Way C230
Team 5: Apple C252
Team 6: Blackberry C297
Peer Evaluations
Members of each team are required to submit a written peer evaluation of each team member’s contribution to the case analysis reports. This will impact each individual’s overall grade for the team case and class leader assignments. Each student should turn in his/her own peer evaluation. Please see the Peer Evaluation form at the end of this syllabus (Appendix III).

Grading Information

1. Individual Class Participation 20%
2. Team Assignments 20%
3. Individual Case Analysis (FORD) 20%
4. Final Individual Case Analysis 40%
Total 100%

Letter grades will be assigned in the following manner:
A 90-100
B 80-89.9
C 70-79.9
D 60-69.9
F BELOW 60

Expectations for Out-of-Class Study
A general rule of thumb for out of class study is that for every credit hour earned, a student should spend 3 hours per week working outside of class. Hence, a 3-credit course might have a minimum expectation of 9 hours of reading, study, etc. Beyond the time required to attend each class meeting, students enrolled in this course should expect to spend at least an additional 9 hours per week of their own time in course-related activities, including reading required materials, completing assignments, preparing for exams, etc.
Course Schedule (Tentative)

*As the professor for this course, I reserve the right to adjust this schedule in any way that serves the educational needs of the students enrolled in this course. –M. Ann McFadyen

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<thead>
<tr>
<th>WEEK</th>
<th>DATE</th>
<th>TOPIC</th>
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<tbody>
<tr>
<td>Week 1</td>
<td>9/1</td>
<td>Introduction</td>
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| Week 2 | 9/8 | Chapter 1 Strategic Management  
WSJ Discussions: All  
Readings:  
**Teams 1 and 2:** The Origin of Strategy  
**Teams 3 and 4:** What is Strategy?  
**Teams 5 and 6:** What’s Wrong with Strategy |
| Week 3 | 9/15 | Chapter 13 Analysis Strategic Management Cases  
WSJ Discussions: All  
Readings:  
**Team 1:** The Value of Value Creation McKinsey  
**Team 2:** Seeing your way to a Better Strategy  
**Team 3:** Adapt your Business to the New Reality |
| Week 4 | 9/22 | Chapter 2 Analyzing the External Environment  
WSJ Discussions: All  
Readings:  
**Team 4:** From SWOT to TOWS  
**Team 5:** Three Behavioral Trends  
**Team 6:** Emerging Demographics |
| Week 5 | 9/29 | Chapter 3 Assessing the Internal Organization  
WSJ Discussions: All  
Readings:  
**Team 1:** The Building Blocks of Strategy  
**Team 2:** How Businesses Successfully Pivoted |
| Week 6 | 10/6 | Chapter 4 Recognizing Firm’s Intellectual Assets  
WSJ Discussions: All  
Readings:  
**Team 3:** How the Coronavirus is redefining jobs  
**Team 4:** Why you should become an Intrapreneur |
| Week 7 | 10/13 | Chapter 5 Business Level Strategy  
WSJ Discussions: All  
Readings  
**Team 5:** When Companies Underestimate Low Cost Rivals  
**Team 6:** Building a Winning Business Model Portfolio |
| Week 8 | 10/20 | Chapter 6 Corporate Level Strategy  
WSJ Discussions: All  
Readings  
**Team 1:** Testing the Limits of Diversification  
**Team 2:** In a Crisis Ecosystem Businesses |
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| Week 9 | 10/27 | **Chapter 8 Entrepreneurial / Competitive Dynamics**  
**Chapter 12 Managing Innovation**  
**WSJ Discussions:** All  
**Readings:**  
**Team 3:** COVID 19 and Bio Revolution  
**Team 4:** Delivery Apps need to start treating Suppliers as Partners |
| Week 10 | 11/3 | **Chapter 9 Strategic Control and Corporate Governance**  
**Chapter 11 Strategic Leadership**  
**WSJ Discussions:** All  
**Readings:**  
**Team 5:** The Board’s Role in Strategy  
**Team 6:** Leading with Purpose and Humanity |
| Week 11 | 11/10 | **WSJ Discussions:** All  
**Readings:**  
**Team 1:** And Now Win the Peace  
**Team 2:** Emerging from the Crisis  
**Team 3:** Covid 19: Strategies for getting ahead after the Pandemic  
**Team 4:** The War on Covid  
**Team 5:** Reimagining Capitalism in the Shadow of the Pandemic  
**Team 6:** Reimagining the Post Pandemic Economy |
| Week 12 | 11/17 | Team Presentations |
| Week 13 | 11/24 | Team Presentations |
| Week 14 | 12/1 | Team Presentations |
| Week 15 | 12/8 | Wrap Up |
| Final Exam | 12/15 | Final Projects 4:30pm |
Institution Information

UTA students are encouraged to review the below institutional policies and informational sections and reach out to the specific office with any questions. To view this institutional information, please visit the Institutional Information page (http://www.uta.edu/provost/administrative-forms/course-syllabus/index.php) which includes the following policies among others:

- Drop Policy
- Disability Accommodations
- Title IX Policy
- Academic Integrity
- Student Feedback Survey
- Final Exam Schedule

Additional Information

Attendance Policy

At The University of Texas at Arlington, taking attendance is not required but attendance is a critical indicator in student success. Each faculty member is free to develop his or her own methods of evaluating students’ academic performance, which includes establishing course-specific policies on attendance. As the instructor of this section, I have outlined my attendance policy below. However, while UT Arlington does not require instructors to take attendance in their courses, the U.S. Department of Education requires that the University have a mechanism in place to mark when Federal Student Aid recipients “begin attendance in a course.” UT Arlington instructors will report when students begin attendance in a course as part of the final grading process. Specifically, when assigning a student a grade of F, faculty report the last date a student attended their class based on evidence such as a test, participation in a class project or presentation, or an engagement online via Blackboard. This date is reported to the Department of Education for federal financial aid recipients.

This course depends on not only attendance but also participation from all students for every class. As a member of this classroom you are obligated to complete all assigned work promptly, to attend class regularly, and to participate in whatever class discussion may occur. Absence from more than 10 percent of the scheduled class sessions, whether excused or unexcused, is considered excessive and a grade penalty will be assessed for such absence. Please note the "10 percent rule" stated above applies to both excused and unexcused absences.”

This course has the following penalties for absences:

- 2 absences → 10 percent reduction in final grade
- 3 absences → 20 percent reduction in final grade
- 4 absences → 30 percent reduction in final grade
- 5 or more absences → student fails the course
Student Success Programs
UT Arlington provides a variety of resources and programs designed to help students develop academic skills, deal with personal situations, and better understand concepts and information related to their courses. Resources include tutoring by appointment, drop-in tutoring, etutoring, supplemental instruction, mentoring (time management, study skills, etc.), success coaching, TRIO Student Support Services, and student success workshops. For additional information, please email resources@uta.edu, or view the Maverick Resources website.

The IDEAS Center (https://www.uta.edu/ideas/) (2nd Floor of Central Library) offers FREE tutoring and mentoring to all students with a focus on transfer students, sophomores, veterans and others undergoing a transition to UT Arlington. Students can drop in or check the schedule of available peer tutors at www.uta.edu/IDEAS, or call (817) 272-6593.

Academic Integrity:

Students enrolled all UT Arlington courses are expected to adhere to the UT Arlington Honor Code:

I pledge, on my honor, to uphold UT Arlington’s tradition of academic integrity, a tradition that values hard work and honest effort in the pursuit of academic excellence.

I promise that I will submit only work that I personally create or contribute to group collaborations, and I will appropriately reference any work from other sources. I will follow the highest standards of integrity and uphold the spirit of the Honor Code.

Please acknowledge the honor code by signing the form at the end of this syllabus. Per UT System Regents’ Rule 50101, §2.2, suspected violations of university’s standards for academic integrity (including the Honor Code) will be referred to the Office of Student Conduct. Violators will be disciplined in accordance with University policy, which may result in the student’s suspension or expulsion from the University. Additional information is available at https://www.uta.edu/conduct/.

Library resources: LIBRARY library.uta.edu
- Research or General Library Help
- Academic Plaza Consultation Services library.uta.edu/academic-plaza
- Ask Us ask.uta.edu/
- Library Tutorials library.uta.edu/how-to
- Subject and Course Research Guides libguides.uta.edu
- Librarians by Subject library.uta.edu/subject-librarians
- Research Coaches http://libguides.uta.edu/researchcoach
- Resources
- A to Z List of Library Databases libguides.uta.edu/az.php
- Course Reserves pulse.uta.edu/vwebv/enterCourseReserve.do
- FabLab fablab.uta.edu/
- Scholarly Communications (info about digital humanities, data management, data visualization, copyright, open educational resources, open access publishing, and more) http://library.uta.edu/scholcomm
- Special Collections library.uta.edu/special-collections
• Study Room Reservations openroom.uta.edu/
• Teaching & Learning Services for Faculty
• Copyright Consultation library-sc@listserv.uta.edu
• Course Research Guide Development, Andy Herzog amherzog@uta.edu or your subject librarian
• Data Visualization Instruction, Peace Ossom-Williamson peace@uta.edu
• Digital Humanities Instruction, Rafia Mirza rafia@uta.edu
• Graduate Student Research Skills Instruction, Andy Herzog amherzog@uta.edu or your subject librarian
• Project or Problem-Based Instruction, Gretchen Trkay gtrkay@uta.edu
• Undergraduate Research Skills Instruction, Gretchen Trkay gtrkay@uta.edu or your subject librarian.
• OTHER RESOURCES
• Environmental Health & Safety (http://www.uta.edu/ehsafety)
Appendix I
Individual Case Assignment
Case: Ford: An Auto Company in Transition
(page C277 in the Textbook)

Purpose
The individual written case analysis exercise is meant to assess:
1. Your critical thinking
2. Your understanding of businesses as interdisciplinary units
3. Your problem solving and decisional abilities, and
4. Your effective communication and writing skills
5. Your core business knowledge

To this end, students will be required to individually analyze a case and submit a written report for evaluation by the due date indicated in the syllabus.

Assignment
You have been hired as a consultant to help Ford Motor Company return to its glory days, when either Henry Ford or Alan Mulally ran the company. In doing so, you are to produce a short report to Jim Hackett, Ford’s CEO, that conveys your observations of Ford’s current situation (situational analysis), and a proposal of strategic actions Ford should take to be the model automotive company of the 21st century. Thus, your task is to answer the following questions based solely on the information provided in the case:

1. Perform an analysis of Ford’s external and internal environments. As you do this, please make sure you organize your response by classifying external trends as opportunities and threats, and by classifying Ford’s internal environment as strengths and weaknesses. Because of the length of the report, select the most salient issues in your eyes. In addition, you must include at least three functional areas/value chain activities in your analysis of Ford’s internal environment (e.g., operations, marketing, and finance), and you must include issues regarding Ford’s financial situation.

2. Based on the external challenges (threats), positive external trends (opportunities), Ford’s limitations (weaknesses), and Ford’s strong suits (strengths) identified in point #1, provide 4 strategic suggestions for Ford’s executives to implement. In other words, combine opportunities/threats you identified, with Ford’s strengths/weaknesses in order to make suggestions on what decisions CEO Hackett needs to make. In your response, make sure you include both strategic actions related to business level strategy (how to compete) and corporate -level strategy (where to compete). Provide strong rationale for your choices.

Expectations
The analysis of the case should reflect both your understanding of the material covered in the text as well as other insights you have gained from other functional area courses. You are encouraged to approach the case with an integrated multi-functional perspective of the organization and to explicate recommendations clearly and concisely in writing. There are
multiple possible answers to the questions provided. Use the critical thinking and problem-solving skills you have developed through your university career.

Individual case analysis write-ups should be well thought out and not trivial. Answers should stick to the facts in the case and analysis. Provide strong reasoning and evidence from the case. All individual case analysis reports are due through the Assignments tab on Canvas. All case reports will be put through Unicheck, a plagiarism tool. The expectation is that you submit your own work. Any plagiarism will be punished to the greatest extent. If your analysis is found to be a copy of someone else’s work, you will earn a ZERO for your individual case analysis grade and you will be reported to the Office of Student Conduct.

**Format**
The case analysis report should be prepared using single-spacing (NOT double-spacing), Times New Roman 12-point font, and a 1-inch all-around margin. The case analysis report should be 3 to 4 pages in length.

Please provide a cover page (not counted in the 3 pages) with your name, the title of the case, the name of the course, the course section, and the date.

Any direct quotes from the case should appear in quotes and the page number should appear in parentheses.
# FORD Individual Case Analysis Rubric (Total points=100)

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Ratings</th>
<th>Points</th>
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<tbody>
<tr>
<td>a. Question 1 – Internal and external analysis</td>
<td>10.0 pts Excelle</td>
<td>10 pts</td>
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<tr>
<td><strong>Description:</strong> The report provides both Internal (5) and external analyses (5).</td>
<td>8.0 pts Good</td>
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<td></td>
<td>6.0 pts OK</td>
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<td></td>
<td>4.0 pts Needs work</td>
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<td></td>
<td>2.0 pts Weak</td>
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<td></td>
<td>0.0 pts No marks</td>
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<td>b. Question 1 – Categorizes trends</td>
<td>10.0 pts Excelle</td>
<td>10 pts</td>
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<tr>
<td><strong>Description:</strong> The report categorizes internal issues as weaknesses (2.5), and strengths (2.5); and categorizes external issues as opportunities (3) and threats (2).</td>
<td>8.0 pts Good</td>
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<td>6.0 pts OK</td>
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<td>4.0 pts Needs work</td>
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<td>2.0 pts Weak</td>
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<td>0.0 pts No marks</td>
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<td>c. Question 1 – Provides a multi-functional analysis</td>
<td>10.0 pts Excelle</td>
<td>10 pts</td>
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<td><strong>Description:</strong> In the analysis of the internal environments, the report includes issues regarding at least 3 different functional areas (6), the report includes the financial health of the organization (4).</td>
<td>8.0 pts Good</td>
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<td></td>
<td>6.0 pts OK</td>
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<td></td>
<td>4.0 pts Needs work</td>
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<td></td>
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<td>0.0 pts No marks</td>
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<td>d. Question 2 – Strategic action 1</td>
<td>10.0 pts Excelle</td>
<td>10 pts</td>
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<td><strong>Description:</strong> The report recommends a strategic action to the CEO that combines a weakness/strength with an opportunity/threat (2). The report provides strong rationale for the merits of strategic action 1 (8).</td>
<td>8.0 pts Good</td>
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<td>6.0 pts OK</td>
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<td>4.0 pts Needs work</td>
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<td>2.0 pts Weak</td>
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<td>0.0 pts No marks</td>
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<td>e. Question 2 – Strategic action 2</td>
<td>10.0 pts Excelle</td>
<td>10 pts</td>
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<td><strong>Description:</strong> The report recommends a strategic action to the CEO that combines a weakness/strength with an opportunity/threat (2). The report provides strong rationale for the merits of strategic action 1 (8).</td>
<td>8.0 pts Good</td>
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<td>6.0 pts OK</td>
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<td>4.0 pts Needs work</td>
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<td>2.0 pts Weak</td>
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<td>f. Question 2 – Strategic action 3</td>
<td>10.0 pts Excelle</td>
<td>10 pts</td>
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<td><strong>Description:</strong> The report recommends a strategic action to the CEO that combines a weakness/strength with an opportunity/threat (2). The report provides strong rationale for the merits of strategic action 1 (8).</td>
<td>8.0 pts Good</td>
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<td>6.0 pts OK</td>
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<td>4.0 pts Needs work</td>
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<td>2.0 pts Weak</td>
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<td>0.0 pts No marks</td>
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<td>g. Question 2 – Strategic action 4</td>
<td>10.0 pts</td>
<td>8.0 pts</td>
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<tr>
<td><strong>Description:</strong> The report recommends a strategic action to the CEO that combines a weakness/strength with an opportunity/threat (2). The report provides strong rationale for the merits of strategic action 1 (8).</td>
<td>Excellent</td>
<td>Good</td>
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<th>h. Question 2 – Strategic actions recommended are both at the Business-level and at the corporate level</th>
<th>10.0 pts</th>
<th>8.0 pts</th>
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<th>2.0 pts</th>
<th>0.0 pts</th>
<th>10 pts</th>
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<tr>
<td><strong>Description:</strong> The report recommends at least one strategic action at the business-level (how to compete) (5) and at least one action at the corporate level (where to compete) (5).</td>
<td>Excellent</td>
<td>Good</td>
<td>OK</td>
<td>Needs work</td>
<td>Weak</td>
<td>No marks</td>
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<tr>
<th>i. Writing and Communication Skills – Message, Grammar and Spelling</th>
<th>10.0 pts</th>
<th>8.0 pts</th>
<th>6.0 pts</th>
<th>4.0 pts</th>
<th>2.0 pts</th>
<th>0.0 pts</th>
<th>10 pts</th>
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<tr>
<td><strong>Description:</strong> The report fully answers the questions using business core knowledge (5), is written in complete sentences (2), with appropriate English grammar (2) and spelling (1).</td>
<td>Excellent</td>
<td>Good</td>
<td>OK</td>
<td>Needs work</td>
<td>Weak</td>
<td>No marks</td>
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<tr>
<th>j. Writing and Communication Skills – Format Guidelines</th>
<th>10.0 pts</th>
<th>8.0 pts</th>
<th>6.0 pts</th>
<th>4.0 pts</th>
<th>2.0 pts</th>
<th>0.0 pts</th>
<th>10 pts</th>
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<tr>
<td><strong>Description:</strong> The report followed the guidelines provided. It is single-spaced (1), 1-inch margins (1), 3 pages long (7), 12-point-times New Roman (1).</td>
<td>Excellent</td>
<td>Good</td>
<td>OK</td>
<td>Needs work</td>
<td>Weak</td>
<td>No marks</td>
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Appendix II
Case Analysis Outline

I. Introduction

II. External Environment [20 points]
A. General Environment (O/T) [10 points]
   Political/Legal
   Economy
   Global
   Demographics
   Sociocultural
   Technology
B. Porter’s Five Forces Industry Environment (O/T) [10 points]
   Threat of Buyers
   Threat of Suppliers
   Threat of New Entry
   Threat of Rivalry
   Threat of Substitutes
C. Overview of All O/T

III. Internal Environment (S/W) [40 points]
A. Internal Analysis [10 points]
   Analyze Value Chain, Fit, VRIN for support
   Define Core Competence
   Identify Competitive Disadvantage, Parity, Temporary, Sustainable
B. Business Level [10 points]
   Analyze Value Chain for one business unit
C. Corporate level [10 points]
   Analyze Value Chains across for multiple business units
D. Financial Analysis of overall health of the organization [10 points]
   Financial Ratio Analysis or Balanced Scorecard
E. Overview of S/W
   Advantage or Lack of Fit

IV. SWOT [15 points]
Match previously identified (from II and III above) Opportunities and Threats (External Environment and Industry Analysis) with Strengths and Weaknesses (Internal Analysis)
   SW = OT

V. Evaluate viable Strategic Alternatives [15 points]
   Present 3 viable strategic alternatives
   Choose best option which optimizes returns and stakeholder value

VI. Writing and Communication Skills [10 points]
## Term Paper Case Analysis Rubric [100 points]

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Ratings</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>I. External analysis</strong></td>
<td></td>
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<tr>
<td><strong>Description</strong>: The report provides general environment and industry analysis.</td>
<td>20 pts</td>
<td>20 pts</td>
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<tr>
<td><strong>Ratings</strong>: Excellent 16 pts</td>
<td>Good 13 pts OK</td>
<td>16 pts</td>
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<tr>
<td><strong>Ratings</strong>: Needs work 10 pts</td>
<td>Weak 6 pts No marks</td>
<td>10 pts</td>
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<tr>
<td><strong>Points</strong>: 20 pts</td>
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</tr>
<tr>
<td><strong>II. Internal analysis</strong></td>
<td></td>
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<tr>
<td><strong>Description</strong>: The report provides a thorough examination of the internal environment. Including complete value chain analysis, FIT, VRIN. Identifies type of advantage and why. Financial analysis</td>
<td>40 pts</td>
<td>40 pts</td>
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<tr>
<td><strong>Ratings</strong>: Excellent 32 pts</td>
<td>Good 26 pts OK</td>
<td>32 pts</td>
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<tr>
<td><strong>Ratings</strong>: Needs work 20 pts</td>
<td>Weak 12 pts No marks</td>
<td>20 pts</td>
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<tr>
<td><strong>Points</strong>: 40 pts</td>
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<tr>
<td><strong>III. SWOT analysis</strong></td>
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</tr>
<tr>
<td><strong>Description</strong>: The report matches previously identified SW and OT</td>
<td>10 pts</td>
<td>15 pts</td>
</tr>
<tr>
<td><strong>Ratings</strong>: Excellent 10 pts</td>
<td>Good 8 pts OK</td>
<td>10 pts</td>
</tr>
<tr>
<td><strong>Ratings</strong>: Needs work 4 pts</td>
<td>Weak 2 pts No marks</td>
<td>4 pts</td>
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<tr>
<td><strong>Points</strong>: 15 pts</td>
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<tr>
<td><strong>IV. Viable strategic alternatives</strong></td>
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<tr>
<td><strong>Description</strong>: The report presents three viable strategic alternatives at both the business and corporate level and strong rationale for the merits of strategic actions.</td>
<td>10 pts</td>
<td>15 pts</td>
</tr>
<tr>
<td><strong>Ratings</strong>: Excellent 10 pts</td>
<td>Good 8 pts OK</td>
<td>10 pts</td>
</tr>
<tr>
<td><strong>Ratings</strong>: Needs work 4 pts</td>
<td>Weak 2 pts No marks</td>
<td>4 pts</td>
</tr>
<tr>
<td><strong>Points</strong>: 15 pts</td>
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<tr>
<td><strong>V. Recommendation</strong></td>
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<tr>
<td><strong>Description</strong>: The report identifies the best viable strategic alternative and strong rational for the merits of that action</td>
<td>10 pts</td>
<td>5 pts</td>
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<tr>
<td><strong>Ratings</strong>: Excellent 10 pts</td>
<td>Good 8 pts OK</td>
<td>10 pts</td>
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<tr>
<td><strong>Ratings</strong>: Needs work 4 pts</td>
<td>Weak 2 pts No marks</td>
<td>4 pts</td>
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<tr>
<td><strong>Points</strong>: 5 pts</td>
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<tr>
<td><strong>VI. Writing and Communication Skills – Message, Grammar and Spelling</strong></td>
<td></td>
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<tr>
<td><strong>Description</strong>: The report fully answers the questions using business core knowledge (5), is written in complete sentences (2), with appropriate English grammar (2) and spelling (1).</td>
<td>5 pts</td>
<td>5 pts</td>
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<tr>
<td><strong>Ratings</strong>: Excellent 5 pts</td>
<td>Good 4 pts OK</td>
<td>5 pts</td>
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<tr>
<td><strong>Ratings</strong>: Needs work 3 pts</td>
<td>Weak 1 pts No marks</td>
<td>3 pts</td>
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<tr>
<td><strong>Points</strong>: 5 pts</td>
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<tr>
<td><strong>VI. Writing and Communication Skills – Format Guidelines</strong></td>
<td></td>
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</tr>
<tr>
<td><strong>Description</strong>: The report followed the guidelines provided. It is single-spaced, 1-inch margins, 5 - 7 pages long, 12-point-times New Roman.</td>
<td>5 pts</td>
<td>5 pts</td>
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<tr>
<td><strong>Ratings</strong>: Excellent 5 pts</td>
<td>Good 4 pts OK</td>
<td>5 pts</td>
</tr>
<tr>
<td><strong>Ratings</strong>: Needs work 3 pts</td>
<td>Weak 1 pts No marks</td>
<td>3 pts</td>
</tr>
<tr>
<td><strong>Points</strong>: 5 pts</td>
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</table>
The purpose of peer evaluation is to reflect the differences in contributions made by individual members of a team. This evaluation form is administered in response to requests made by members of your team. Observe the following rules while doing the peer evaluation.

1. Multiply the number of team members by hundred. Thus, if there are 5 members in your team, you have 500 points to distribute.

2. Make sure that the total adds up to number of team members multiplied by hundred.

3. Be fair in your evaluation of yourself and your team members.

4. Self-evaluations out of line with evaluations by other team members will be disregarded.

<table>
<thead>
<tr>
<th>NAME</th>
<th>POINTS</th>
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<tbody>
<tr>
<td>(Your Name)</td>
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TOTAL       500