BUSI 4940
Business Policy
Fall 2015
Course Syllabus

Instructor (Overall responsibility for the course)
Dr. Gaffney (nolan.gaffney@unt.edu)
Office: BLB 385B
Office hours: Tuesdays 3pm – 6pm and By Appointment

Graduate Assistant (Team Pages, Case Information)
Beth Struckell (elisabeth.struckell@unt.edu)
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Teaching Assistant (Grades all assignments and exams)
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Office hours: Tuesdays 6-6:30pm; Fridays 1-4pm

Section 002: Meets on Tuesday evenings from 6:30pm to 9:20pm in BLB 080.

COURSE DESCRIPTION AND OVERALL GOAL:
Business Policy (BUSI 4940) is a capstone course that focuses on the integration of functional areas and requires students to determine policy at the general-management level. Students address problems and issues faced by business firms seeking to manage the relationships between different elements of the firm, and to integrate functional areas in order to optimize performance.

Prerequisites: Completion of all other business foundation courses and senior standing. This course is to be taken in the last semester of course work.

REQUIRED COURSE MATERIALS:
- Turning Point’s Response Card “Clicker” (available at the UNT bookstore)

ANNOUNCEMENTS AND COMMUNICATION:
The Announcements section (in Blackboard) provides official bulletins and announcements by the instructor. Since the Announcements section is an "official site" within Blackboard and part of the course, you are responsible for knowing the information there.
Emails to the class will be sent through Blackboard. If you would prefer to get communications from this course sent to a different email address than your UNT account, please change your email address in the Blackboard system. To change your address, you click on the "My Institution" tab within Blackboard. On the left hand side of the page there will be a list of tools. Click on the personal information link and edit your email address.

COURSE OBJECTIVES:
This course is structured to help you achieve four major objectives. On completion, you will:

1. Be able to demonstrate the ability to apply knowledge and skills acquired in the business program (particularly the business core) in analyzing a business situation
2. Be able to apply a holistic and integrated approach to managing the capabilities that make up an organization.
3. Be able to organize your thinking around an integrative framework which includes, the external environment of the organization, managerial preferences, strategic fit, competitive advantage, organizational capabilities and performance.
4. Have acquired the knowledge and skill sets necessary to conduct a 3 step process for strategic business integration that include, performance analysis, strategic fit analysis, development of new strategic alternatives, and the appraisal, defense, and implementation of an action-plan that optimizes future firm performance.

PERFORMANCE EVALUATION AND GRADING:
Your grade in this course will be determined by your performance on assignments, examinations and your participation in classroom and team-specific activities. The points-distribution will be as follows:

1. Exercises (150 points)
   a. In-class clicker exercises – 90 points
   b. Undergraduate Business Foundation Quiz – 40 points
   c. Syllabus Quiz – 10 points
   d. Guest Speaker Event – 10 points
2. Assignments (500 points)
   a. Individual Assignment – 80 points
   b. Team Assignment #1 – 170 points
   c. Team Assignment #2 – 250 points
3. Exams (350 points)
   a. Mid-term Exam – 150 points
   b. Comprehensive Exam – 200 points

Total: 1000 points

Letter Grade Equivalent
A (900 to 1000 total points)
B (800 to 899.9 total points)
C (700 to 799.9 total points)
D (600 to 699.9 total points)
F (599.9 or below total points)

Note: No “extra credit” assignments are offered in this course. Grades will not be curved.
METHOD OF INSTRUCTION:
Classes in the course will be conducted using discussions, exercises, articles and assignments. Classroom discussions will be used to elaborate on and extend the content of the readings, developing conceptual ideas and applying them to business situations. Teams will be formed early in the semester. Each team will work on two integrative business cases.

This is a skills-building course. You learn through repetition and through cooperative learning. You will build competencies working with members of your team to apply the strategic business integration process to real-world situations. Keeping that in mind, we will begin at a slow pace. The pace will quicken considerably. It is your responsibility to stay committed and keep pace with the class.

IMPORTANT! For this method of instruction to work effectively, you must read and analyze all assigned materials BEFORE attending class. A good rule of thumb is to spend as much time analyzing and preparing the material as you do reading it.

CLICKER EXERCISES:
During each class session you will be asked to answer questions using your clicker. These questions may focus on specific material that you should have reviewed before class (including material covered in business foundation (core) courses) and/or may address questions designed to further class discussion. You may be asked to answer these questions individually or after discussions with your peers in the class. Points are earned by providing the correct answer. A small credit is provided just for participating. 90 points will be allocated to clicker questions relating to material covered in the course. These questions may come at any time during class – it is therefore your responsibility to have your clicker available at all times during class. In addition, 10 points are reserved for a syllabus clicker quiz, and 40 points are reserved for a clicker test on material covered in Undergraduate Business Foundation courses.

You must bring your clicker to EVERY class session. No clickers, no points, no question!
- It is your responsibility for bringing your clicker to every class session and to make sure that your clicker is registered and functional.
- Each clicker uses two batteries (Battery # CR2032). Batteries for the clickers can go out without much notice. As such, it is good practice to monitor the battery charge indicator on the response pad, and to have a spare set of batteries with you at all times. A failed clicker is NOT an acceptable excuse for missed clicker points. Please register your clicker by 9:00 am on August 25th.

ASSIGNMENTS:
Assignments are structured to take advantage of the cooperative learning environment in the course, and to help you apply the concepts presented in class to real-world situations.

Individual Assignments
Individual Assignment (80 points): This assignment will be completed early in the semester (see Appendix 1: Schedule of Events for specific dates). Individuals will be assessed on the SBI Process Parts 1A and 1B via two written submissions (40 points each). Further instructions will be provided in class.

Guest Speaker (10 points): There will be three events scheduled as part of the College of Business’ Distinguished Speaker Series (DSS). Events will typically occur on Fridays, from 10:00 am till 11:30 am. Attending any one of these events will be considered an assignment worth 10 points in this course. Attendance by all students is encouraged, but we recognize that scheduling conflicts may occur. Those
whose schedules will not allow them to attend an event, may complete an alternative written assignment, provided by the instructor, to make up for it.

**Team-based Assignments**
Team members will work collaboratively to address two team assignments.

**Team Assignment #1**
Teams will apply each part of the Strategic Business Integration (SBI) process to a case assigned by the instructor through three in-depth reports and a video presentation.

**Team Reports: (140 points)**
Each team will submit three reports – one for each part of the SBI process. The first report will cover Part 1 (A&B) of the SBI process, should be limited to 6-7 typed, single spaced pages (excluding tables, exhibits and references), and is worth **40 points**. The second report will cover Part 2 (A&B) of the SBI process, should be limited to 7-8 typed, single spaced pages (excluding tables, exhibits and references), and is worth **50 points**. The third report will cover Part 3 (A&B) of the SBI process, should be limited to 7-8 typed, single spaced pages (excluding tables, exhibits and references), and is worth **50 points**.

Report submission guidelines:
- Use the format presented in Appendix-3 titled “Team Report Structure.”
- Demonstrate command and understanding of the issues involved in the assignment and their interrelationships; and your team’s ability to use the Strategic Business Integration Process.
- Use sound logic and strong justifications.
- Be of the highest professional standard.
- Limit the team report to the page length specified above.

Templates for each part of the assignment will be made available via the blackboard website. In addition, the grading rubrics for each part of the assignment are also available. Check the schedule of events in this document for specific submission dates.

**Team Presentation: (30 points)**
Teams will create a video of their team’s presentation and submit it to the instructor on a thumb drive (your instructor will provide your team with a thumb). Instructions for creating the video will be provided in class. The videos should not be more than 15 minutes in length and should demonstrate, (a) good content and (b) powerful presentation. The presentation is worth **30 points**.

**Team Assignment #2**
Teams will apply each part of the Strategic Business Integration (SBI) to a “live” case. Teams will submit a progress report and a formal written report (based on Appendix 3), as well as make a presentation.

**Team Progress Report: (10 points)**
Each team will submit a short (1-page) bulleted summary of evidence of the team’s progress toward completion of Team Assignment #2 worth **10 points**. In addition, each team will have a 5-minute, 1-on-1 discussion with the instructor. The presentation should offer evidence of the research undertaken and analysis completed. **Teams are expected to have completed at least parts 1A, 1B and 2A of the SBI process at the time of this presentation.** See Appendix 1- Schedule of Events for the submission deadline.
Team Report: (190 points)
Please follow the guidelines presented in Appendix 3 when creating your report. The report must (a) demonstrate command and understanding of the issues involved in the assignment and their interrelationships, and your team’s ability to systematically apply the Strategic Business Integration Process, (b) use sound logic and well thought through justifications, and (c) display a liberal use of appropriate graphs, charts and tables.

The report should cohesively cover Parts 1, 2 & 3 of the SBI process and is worth 190 points. Limit your report to about 20-23 typed (single-spaced) pages total excluding tables, exhibits and references.

Team Presentation: (50 points)
The presentation must be of the highest professional standard. Use appropriate presentation mediums and captivating presentation styles and is worth 50 points. The presentation must be limited to 15 minutes. Grades will be based on two criteria:

1. The content of the presentation
2. The quality of the presentation

Integrated Case Competition
The top performing teams on Team Assignment #1 will be invited to compete in the Integrated Business Case Competition. Teams not competing in the case competition, must create a video of their team’s presentation and submit it to the instructor on a thumb drive (your instructor will provide your team with a thumb drive).

The first round of the case competition will take place during class time in Week 13 and will involve making a formal presentation to a panel of faculty judges. The top 2-3 teams chosen by the faculty judges will advance to the final round of the case competition and will present their work to representatives of the case company (to be held Saturday, November 21st). These teams will compete for sizable cash prizes and recognition. Information about the competition and pictures of past winners can be found through the link (http://cob.unt.edu/case_competition/) on the college web page.

INDIVIDUAL INVOLVEMENT IN TEAM ACTIVITIES:
Your involvement and interaction in team activities will be evaluated by your peers. It will be based on their assessment of a) your ability to foster team spirit and display initiative while working on the project; b) your attendance at scheduled meetings (face-to-face or virtual), and c) your participation in group discussions, completion of assigned work and contribution to project completion. The evaluation will be conducted collectively by members of the team after each team assignment/report is completed. The consensus decision, duly signed by all team members, will be submitted to the instructor.

Based on the grade awarded by your peers, you will either receive the full points associated with the team grade on the relevant part(s) of the team assignments or only a portion of the points. A sample “Involvement and Interaction in Team Activity” evaluation form is presented in Appendix-2. In addition, the appendix contains an explanation of how the peer assessment is used to calculate your grade. NOTE: Any team member may request that the instructor arbitrate team ratings. If arbitration is requested, and conducted, the decision of the instructor will be final.
The intent in having you do this is twofold. First, it is hoped that a collective discussion of the contributions of each person will help the team develop clear norms and expectations regarding appropriate behavior and the work that each member must do to ensure good performance on the team assignments. While having such discussions can sometimes be uncomfortable, working through this process in an open, positive manner will help produce a positive experience and outcome for all members and is a valuable skill to take with you into the workplace.

The second purpose of the evaluations is to ensure a fair grading process for each member of the team. Ideally, all team members will behave and contribute at the levels expected. If they do not, however, they should not receive the same points as those members who do contribute at appropriate levels. To that end, the percentages assigned to each member will be used for assigning grades in a manner explained in Appendix-2.

For this process to work well, it requires that the team be open and honest in communicating their expectations. Criticism is okay if it is done in a constructive manner. If you feel that someone is not pulling their weight, immediately let them know where they are falling short and what they can do to correct their actions. The forms provided in Appendix-2 will help the team do this after each assignment is turned in, but try to make it a part of the team norms from the very beginning – it will help avoid preempt problems and hurt feelings later. And, remember that if you ever need help with the process, the instructor, the GA and the TAs will be happy to help. Do not hesitate to call on us.

EXAMINATIONS:
Mid-term Exam
A mid-term test (150 points) will be administered in Week 10 of the semester. The test is designed to assess your understanding of key concepts associated with the strategic business integration (SBI) process. This is a “closed book/notes” exam. However, you are allowed to bring a single 8”x11” “information-sheet” to the exam.

Comprehensive Exam
The comprehensive exam (200 points) will consist of five essay-type questions. The comprehensive exam is designed to test not only your understanding of the theoretical and conceptual foundations of the SBI process, and your ability to apply the three-part SBI process to a real-world situation.

SUNDOWN POLICY:
You have one week (from the date a grade is posted) to inquire about, and to appeal your grade on an exam, assignment, or presentation, after which no appeals will be entertained. The purpose is to resolve any issue during the term and not wait until the last week of the term. Please check your grades every week!

POLICY FOR MAKE-UP QUIZ / TESTS / EXAMINATIONS:
If you miss an exercise, individual assignments, test, or comprehensive exam for justifiable reasons (e.g., hospitalization, contagious disease, religious holiday, death in the family), and would like to take a make-up quiz/test/exam, you must provide the instructor with evidence of the occurrence. All make-up examinations will be held on December 1st. Points for in-class clicker exercises that are missed for justifiable reasons (e.g., hospitalization, contagious disease, religious holiday, death in the family), will be pro-rated based on your average score on clicker exercise questions during the semester.
BLACKBOARD:
This course will make extensive use of the web through Blackboard. It is your responsibility to keep up with material, instructions, announcements, e-mails, and grade postings that will be made available to you throughout the semester on Blackboard. As a rule, assignments are turned in electronically through drop boxes created by your instructor in Blackboard.

ACADEMIC DISHONESTY:
Students caught cheating or plagiarizing will receive a "0" for that particular assignment or exam [or specify alternative sanction, such as course failure]. Additionally, the incident will be reported to the Dean of Students, who may impose further penalty. According to the UNT catalog, the term "cheating" includes, but is not limited to: a. use of any unauthorized assistance in taking quizzes, tests, or examinations; b. dependence upon the aid of sources beyond those authorized by the instructor in writing papers, preparing reports, solving problems, or carrying out other assignments; c. the acquisition, without permission, of tests or other academic material belonging to a faculty or staff member of the university; d. dual submission of a paper or project, or resubmission of a paper or project to a different class without express permission from the instructor(s); or e. any other act designed to give a student an unfair advantage. The term "plagiarism" includes, but is not limited to: a. the knowing or negligent use by paraphrase or direct quotation of the published or unpublished work of another person without full and clear acknowledgment; and b. the knowing or negligent unacknowledged use of materials prepared by another person or agency engaged in the selling of term papers or other academic materials.

ACCEPTABLE STUDENT BEHAVIOR:
Student behavior that interferes with an instructor's ability to conduct a class or other students' opportunity to learn is unacceptable and disruptive and will not be tolerated in any instructional forum at UNT. Students engaging in unacceptable behavior will be directed to leave the classroom and the instructor may refer the student to the Dean of Students to consider whether the student's conduct violated the Code of Student Conduct. The university's expectations for student conduct apply to all instructional forums, including university and electronic classroom, labs, discussion groups, field trips, etc. The Code of Student Conduct can be found at http://deanofstudents.unt.edu.

ACCESS TO INFORMATION – EAGLE CONNECT:
Your access point for business and academic services at UNT occurs within the my.unt.edu site (http://www.my.unt.edu). All official communication from the university will be delivered to your Eagle Connect account. For more information, please visit the website that explains Eagle Connect and how to forward your e-mail: http://eagleconnect.unt.edu/

ADA STATEMENT:
The University of North Texas makes reasonable academic accommodation for students with disabilities. Students seeking accommodation must first register with the Office of Disability Accommodation (ODA) to verify their eligibility. If a disability is verified, the ODA will provide you with an accommodation letter to be delivered to faculty to begin a private discussion regarding your specific needs in a course. You may request accommodations at any time, however, ODA notices of accommodation should be provided as early as possible in the semester to avoid any delay in implementation. Note that students must obtain a new letter of accommodation for every semester and must meet with each faculty member prior to implementation in each class. For additional information, see the Office of Disability Accommodation website at http://disability.unt.edu. You may also contact them by phone at (940) 565-4323.
## Appendix 1 - Schedule of Events

<table>
<thead>
<tr>
<th>Week</th>
<th>Date</th>
<th>Topics</th>
<th>Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>8/25</td>
<td>Introduction and Overview</td>
<td><strong>Class Discussion:</strong> The Strategic Business Integration (SBI) process: SBI Components and Grading Rubric.</td>
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<td></td>
<td></td>
<td>The Strategic Business Integration (SBI)</td>
<td><strong>Supporting Resources:</strong> Chapter 1</td>
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<td></td>
<td></td>
<td>process</td>
<td><strong>Clickers:</strong> Practice clicker exercise</td>
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<td><strong>Homework:</strong> Register your clickers (link found on class page in blackboard)</td>
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<td></td>
<td><strong>Register for graduation!</strong></td>
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<tr>
<td>2</td>
<td>9/1</td>
<td>Review of Undergraduate Business Foundation</td>
<td><strong>Class Discussion:</strong> Review of courses in the Undergraduate Business Foundation</td>
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<td></td>
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<td><strong>Guest Speakers:</strong> Katherine Kroh – Business REAL Community Mentor</td>
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<td><strong>Syllabus Quiz:</strong> A graded clicker exercise</td>
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<tr>
<td>3</td>
<td>9/8</td>
<td>Part-1A of SBI process</td>
<td><strong>Class Discussion:</strong> Analyzing the Environment</td>
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<td><strong>Supporting Resources:</strong> PowerPoint and Template for Part-1A of the SBI Process, Chapter 4</td>
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<td><strong>Assignment:</strong> Individual Assignment Part-1 (Industry)</td>
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<tr>
<td>4</td>
<td>9/15</td>
<td>Part-1B of SBI process</td>
<td><strong>Class Discussion:</strong> Assessing the current status of the firm (mission, vision, strategy and performance)</td>
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<td><strong>Supporting Resources:</strong> PowerPoint and Template for Part-1B(1) of the SBI Process ; Chapters 1 &amp; 2</td>
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<td><strong>Foundation quiz:</strong> The U.G. Business Foundation Quiz (clickers required!)</td>
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<td><strong>Submission:</strong> Individual Assignment Part-1 Written submission (2 hard copies)</td>
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<td><strong>Teams Formed:</strong> Team membership, and seating assignments</td>
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<td></td>
<td></td>
<td></td>
<td><strong>Assignment:</strong> Individual Assignment Part-2 (Firm)</td>
</tr>
<tr>
<td>5</td>
<td>9/22</td>
<td>Part-1B of SBI process</td>
<td><strong>Class Discussion:</strong> Assessing firm capabilities (Resources, managerial preferences, and organizing processes)</td>
</tr>
<tr>
<td></td>
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<td></td>
<td><strong>Supporting Resources:</strong> Template for Part-1B (2) of the SBI Process; Chapters 6 &amp; 7, Chapter 8 (p. 152-157)</td>
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<td><strong>Submission:</strong> Individual Assignment Part-2 Written submission (2 hard copies)</td>
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<td><strong>Team Charter:</strong> Submit hard copy, signed by all team members</td>
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<td></td>
<td><strong>Assignment:</strong> Team Assignment #1 Part-1 (A&amp;B) (Industry &amp; Firm information)</td>
</tr>
<tr>
<td>6</td>
<td>9/29</td>
<td>Part-2A of SBI process</td>
<td><strong>Class Discussion:</strong> Assessing Strategic Consistency (Fit)</td>
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<td></td>
<td><strong>Supporting Resources:</strong> Handout and Template for Part-2A of the SBI Process</td>
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<td></td>
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<td></td>
<td><strong>Submission:</strong> Team Assignment #1 Part-1 (Submitted via Blackboard by 6pm)</td>
</tr>
<tr>
<td>Week</td>
<td>Date</td>
<td>Topic</td>
<td>Class Discussion</td>
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<tr>
<td>7</td>
<td>10/6</td>
<td>Part-2B of SBI process</td>
<td>Formulate and evaluate a new strategic proposal</td>
</tr>
<tr>
<td>8</td>
<td>10/13</td>
<td>Part-3A of SBI process</td>
<td>Develop an implementation plan</td>
</tr>
<tr>
<td>9</td>
<td>10/20</td>
<td>Part-3B of SBI process</td>
<td>Confirm financial viability of the proposal</td>
</tr>
<tr>
<td>10</td>
<td>10/27</td>
<td>Mid-Term Exam</td>
<td>All concepts covered in Parts 1, 2 and 3 of the SBI process</td>
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<td></td>
<td>10/30</td>
<td>Team Video Presentation</td>
<td><strong>Team Assignment #1 Video Presentation:</strong> Submitted on flash between 9am and 1pm (Location: TBA)</td>
</tr>
<tr>
<td>11</td>
<td>11/3</td>
<td>Team Assignment #2</td>
<td>Teams present initial work on final team project to instructor (1-page submission and 5-minute session with instructor)</td>
</tr>
<tr>
<td></td>
<td>11/6</td>
<td>Interview with Company Executive</td>
<td>Time: 4pm to 6pm</td>
</tr>
<tr>
<td>12</td>
<td>11/10</td>
<td>Review of the SBI process</td>
<td>Tying the pieces together</td>
</tr>
<tr>
<td>13</td>
<td>11/17</td>
<td>Team Presentations</td>
<td>Team Presentations schedule - TBA (Finalists for the Integrated Business Case Competition announced at the end of the class session)</td>
</tr>
<tr>
<td></td>
<td>11/21</td>
<td>Final Round of Integrated Business Case Competition</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>11/24</td>
<td>Team Project and Class Feedback</td>
<td><strong>IMPORTANT:</strong> You must attend this class!!! Course and Instructor Evaluations</td>
</tr>
<tr>
<td>15</td>
<td>12/1</td>
<td>Comprehensive Exam Prep</td>
<td><strong>Make-up Exams:</strong> Custom-scheduled make-up (eligibility criteria on page 6)</td>
</tr>
<tr>
<td>16</td>
<td>12/8</td>
<td>Final</td>
<td>COMPREHENSIVE EXAM: Parts 1, 2 &amp; 3 of the SBI process</td>
</tr>
</tbody>
</table>

**Dates and topics are subject to change:** While I do not plan to deviate from the above schedule, unforeseen events may require adjustments.
Appendix – 2
Involvement and Interaction in Team Activities – Explanation

For each of the team assignments the team will collectively rate the contributions of each of the team members. All team members must sign the form (shown on the next page) to acknowledge their acceptance of the ratings. The intent in having you do this is twofold. First, it is hoped that a collective discussion of the contributions of each person will help the team develop clear norms and expectations regarding appropriate behavior and the work that each member must do to ensure good performance on the team assignments. While having such discussions can sometimes be uncomfortable, working through this process in an open, positive manner will help produce a positive experience and outcome for all members and is a valuable skill to take with you into the workplace.

The second purpose of the evaluations is to ensure a fair grading process for each member of the team. Ideally, all team members will behave and contribute at the levels expected. If they do not, however, they should not receive the same points as those members who do contribute at appropriate levels. To that end, the percentages assigned to each member will be used in the following manner for assigning grades.

First, the team assignment will be graded based on how well it addresses the questions and guidelines in the assignment. This assignment grade will serve as the starting point for individual grades. All team members given overall participation percentages between 90 and 100% will receive the number of points that the assignment received (i.e., the team grade) as their score for the assignment. Members receiving less than 90%, however, will receive only a portion of the team grade based on the following formula.

<table>
<thead>
<tr>
<th>Participation %</th>
<th>Points awarded</th>
</tr>
</thead>
<tbody>
<tr>
<td>90 – 100%</td>
<td>100% of team grade</td>
</tr>
<tr>
<td>80 – 89%</td>
<td>90% of team grade</td>
</tr>
<tr>
<td>70 – 79%</td>
<td>80% of team grade</td>
</tr>
<tr>
<td>60 – 69%</td>
<td>70% of team grade</td>
</tr>
<tr>
<td>50 – 59%</td>
<td>60% of team grade</td>
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<tr>
<td>*</td>
<td>50% of team grade</td>
</tr>
<tr>
<td>*</td>
<td>40% of team grade</td>
</tr>
<tr>
<td>1 – 10%</td>
<td>10% of team grade</td>
</tr>
</tbody>
</table>

As an example, consider a team whose assignment received a grade of 90 (out of 100 possible). A team member who got a participation percentage of 94% would receive the full 90 points. A member who received a participation score of 83%, however, would only get 81 points for the assignment (90 X 0.9 = 81).

For this process to work well, it requires that the team is open and honest in communicating their expectations. Criticism is okay if it is done in a constructive manner. If you feel that someone is not pulling their weight, let them know where they are falling short and what they can do to correct their actions. The forms that follow will help the team do this after each assignment is turned in, but try to make it a part of the team norms from the very beginning – it will help avoid later problems and hurt feelings. And remember that if you ever need help with the process, the instructor and the TAs will be happy to help. Don’t hesitate to call on us.
Appendix – 2
Involvement and Interaction in Team Activities – A Team Exercise

Team #: __________  Activity: ____________________________

INSTRUCTIONS:
* Evaluate the overall performance of each team member using the following criteria.
  1. Did the individual foster team spirit and display initiative while working on project?
  2. Did the individual attend and actively participate in scheduled meetings (face-to-face or virtual)
  3. Did the individual contribute adequately on the wiki?
  4. Did the individual participate in group discussions, complete assigned work and contribute to project completion?
* Team members will work collectively to grade each individual’s performance on the four criteria provided above.
* Specific comments must be included on the next page indicating why each team member received their score. Absence of detailed justification may result in your evaluations being adjusted at the discretion of the instructor.
* Any team member may request the instructor to arbitrate discussions. In such an event, decision from the arbitration shall be final.
* Return the completed and signed form to the instructor at the appointed time.

<table>
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<tr>
<th>NAME OF TEAM MEMBER</th>
<th>POINTS ALLOTTED</th>
<th>AVERAGE SCORE</th>
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<tbody>
<tr>
<td></td>
<td>Foster team spirit and display initiative</td>
<td>Attended / participated in scheduled meetings (face-to-face or virtual)</td>
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<td>Max = 100%</td>
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Appendix – 2
Involvement and Interaction in Team Activities – Continued
(COMMENTS SHEET)

You **MUST** provide comments on **ALL** team members. These include comments in two areas: a) **good contributions by the member** (e.g., identifying the work contributed by the member, specific examples of good team behavior, etc.), and b) **areas where the member could improve** (e.g., specific bad behaviors to avoid, meeting deadlines, communication, etc.). Please be as detailed as possible in order to justify the assigned percentages and let each team member clearly know what they were doing right or wrong. **Absence of detailed justification may result in your evaluations being adjusted at the discretion of the instructor.**

<table>
<thead>
<tr>
<th>Team Member</th>
<th>Good Contributions</th>
<th>Areas for Improvement</th>
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Appendix – 3
Team Report Structure

Your report (PDF or hard-copy) should begin with the following:
- A title page
- A letter of transmittal (on your “company’s” letterhead, with one point of contact)
- An executive summary (not more than one page)
- A table of contents
- A table of figures

Then proceed to the content of the report itself . . .

SBI Process Part 1

ANALYZE THE ENVIRONMENT
- Identify sources used to collect information for the PEST and the 5-Forces analysis
- Identify forces in the environment
  - Identifying the various forces, and selecting the top-3 forces in the competitive environment
  - Identifying the various forces, and selecting the top-3 forces in the broad environment
- Use the information collected on environmental forces to determine the most significant
  - “Drivers of Change”
  - “Key Survival Factors”
- Overall, how attractive is this environment today?
- What is the environment likely to look like 5 years from now?

ASSESS THE CURRENT STATUS OF THE FIRM
- Current mission of the firm
- Current vision of the firm
- Current strategy of the firm (i.e., the goals, product focus, market focus and value proposition)
  - Are the strategy components clearly articulated and communicated within the organization?
  - Are the components of the strategy compatible with each other? With the mission and vision of the firm?

ASSESS FIRM PERFORMANCE
- Identify sources used to collect information on the performance of (1) the firm, and (2) the industry.
- Identify the most appropriate performance measures that should be used for this firm (and for the industry) on each of the performance dimensions.
- Provide your arguments and conclusions on,
  - The financial performance and profitability of the firm
  - The market performance of the firm
  - The organizational health of the firm
  - The overall performance of the firm (position on 2x2 performance matrix)

ASSESS CURRENT ORG. CAPABILITIES
- Identifying current organizational capabilities
  - Customer capabilities
  - Innovation capabilities
  - Operational capabilities
Provide details on how the firm has used the following to create the three capabilities
- Resources
- Management Preferences
- Organizing processes

**SBI Process Part 2**

**ASSESS STRATEGIC FIT**

Use information gleaned from your analysis of Part-1 of the SBI process to,
- Assess environmental opportunities and threats *in the context of* the firm’s current strategy (i.e., compare the drivers of change and key survival factors of the environment with the strategy components of the firm)
- Assess organizational capabilities *in the context of* the firm’s current strategy (i.e., compare the firms capabilities with its strategy components)
- Assess whether the gaps identified above explain the lapses in firm performance found on one or more of the performance dimensions: financial performance, market performance and organizational health?

The outcome of your analysis should include
- The identification of most significant strategic gaps (issues) facing the firm
- A forecast of future performance of the firm if it continues using its current strategy (use the common-size technique, appropriately adjusted to account for the identified strategic gaps, to make these projections)

**SELECTING A NEW STRATEGY**

Given your work in Part 2A, you probably have a number of ideas for what the company “could do” to address the gaps. Note that this is very different from what they “should do”. You must therefore identify generic “could dos” before you select “should dos.”

- Identifying possible “Could dos”
  - List possible strategic adjustments
  - List possible capability adjustments
- Clearly describe two acceptable “Should dos”
  - Proposal-1 (Goals, strategy, and capabilities)
    - Describe how these are different from the *current* goals, strategy and capabilities
  - Proposal-2 (Goals, strategy, and capabilities)
    - Describe how these are different from the *current* goals, strategy and capabilities
- Choose a strategic proposal
  - Which proposal do you prefer?
  - Why do you prefer this proposal?
  - Which proposal carries more risk?
  - What might occur (inside or outside the firm) that would jeopardize the proposal?

**SBI Process Part 3**

**IDENTIFYING NECESSARY CHANGES TO ORG. CAPABILITIES**

(This is a long and labor-intensive exercise)
Build on the list of broad capability changes identified earlier in part-2B of the SBI process so to describe, the functional level changes that need to be made so that the resultant “new” capabilities can be used to successfully implement the new strategy.

- Which departments will be significantly impacted (and how will these departments be impacted) by the **proposed changes to the firm’s customer capability**?
- Which departments will be significantly impacted (and how will these departments be impacted) by the **proposed changes to the firm’s innovation capability**?
- Which departments will be significantly impacted (and how will these departments be impacted) by the **proposed changes to the firm’s operational capability**?

Considering all changes, identify the departments (functional areas) that would be most significantly affected by the recommended changes, and develop a functional plan for *each* of the affected departments.

- When in the next 5 years will these departmental changes have to be made? (timing and prioritization and risk associated with implementing the proposed changes)
- What will it cost to make these departmental changes?
- Impact on firm performance? Will any of the changes increase or decrease existing operating costs? What, if any, impact will each of the changes have on the company’s revenues?

**IMPLEMENTING THE PROPOSED CHANGES**

- Develop a change agenda
- Analysis of starting conditions
- Create an action plan

**CONFIRM FINANCIAL VIABILITY**

- Prepare 5-year pro forma financial statements (income statement, balance sheet and cash flow)
- Determine how the company is going to pay for the proposed changes
- Confirm financial viability of the strategic org. Integration proposed by your team