**Section A**

Suggestions for Case Method Teaching

**SUGGESTIONS FOR CASE METHOD TEACHING**

The most popular, as well as the most perceived effective, approach to teaching strategic management is the case method. Its strengths include a real-world orientation (believed to generate student involvement) and the ability to focus on developing decision-making skills by taking an integrative and conceptual, yet action-oriented, approach. This method may not go well, however, if the instructor is inexperienced in the use of cases and/or the students are not motivated to do more than a superficial reading of the cases. A capable case instructor must be able to force the typical student to go beyond **satisficing** at a very low level (e.g., “In my opinion, they ought to fire the CEO.”).

If given a free rein, the average undergraduate tends to Monday morning quarterback the case. For example, if everyone knew that Hershey Foods successfully developed and marketed a new type of sugar-free candy this year, there would be a strong tendency to recommend this solution, rather than other alternative courses of action. As a result, an instructor new to the case method must ensure that students truly understand that the best solution to any case problem is not: (a) the one the instructor mentions, (b) what the company actually did, or (c) the most obvious solution. The best solution comes from the best analysis. This means that the instructor must work hard to ensure that students don’t take the easy route by merely stating the symptoms as if they were underlying problems and going immediately to their desired solution without regard for alternatives.

###### Suggestions for Using Cases

There are many ways to use cases. Some instructors prefer to generate open class discussion. Others prefer to assign cases to student teams for oral presentations. Most like to have students write an analysis of at least one case during the course, often as a final exam.

**Open Class Case Discussion**

One approach is for the instructor to lead the discussion with penetrating questions and answers, like Professor Kingsfield in the classic film, *The Paper Chase*. A majority of instructors prefer to begin the analysis with a few key questions and hope to get the students to become involved in the discussion. The instructor then tends to fade into the background or puts key points on the blackboard. This approach may work very well for graduate students, but fails miserably with undergraduates. As shown in Exhibit 1, the “typical” undergraduate strategy class needs much more pushing and prodding by the instructor than most graduate classes to keep discussion moving. Some suggested steps to get open class case discussion going in either type of class are:

 1. Read the case over carefully before class. Then study the case. Calculate common size financial statements and adjust for inflation. Any obvious problem areas?

 2. Read the teacher’s notes for the case. Use the instructor’s manual! Read previous student papers, if possible.

 3. Decide how you’re going to run the class. What key points need to be addressed? Can you break the class up into teams and have them role-play key stakeholders or analyze certain parts of the case and present them to the class? Prepare an outline of how you would like the discussion to go and guess how much time is needed per major point.

 4. Put together a usable seating chart. If the class meets for a long period of time, ask the students to make their own name cards and to bring them to class each time. Bring pieces of paper and magic markers for them to use at the first meeting (one marker for each row in the class). Be prepared to keep track of discussion in pencil on your seating chart. If you call on them, mark a check next to their names. If the answer is very good, put a + next to the check. If it is just a satisfactory answer, simply leave the check as is. If the answer is poor, place a minus next to the check. If someone volunteers, mark a straight line next to his or her name. If it’s a great comment, make it a plus sign. You can either do this during class or immediately after (if you have the time). Then transfer your marks to a separate sheet with dated columns.

 5. Start with the basics. Call on someone to state the basic facts of the case. Ask him or her to describe the firm. When was it founded? What does it make? How well is it doing? The first undergraduate will probably respond in terse sentences, such as “It makes electronic parts.” Getting more information may require you to play dentist—pulling sentence fragments out like teeth. “What kind of electronic parts? Who buys them? How are they made? How are its sales? Is it profitable?” As the typical undergraduate begins to falter and skims wildly through the pages of the book, hopefully you will hear from a volunteer. Keep rolling.

 6. Go through your outline section by section. Put the topic headings on the blackboard as they are discussed and write in key points under each. Remember to leave enough time to develop alternatives with pros and cons for each. Force the class to make a decision. Have them personally vote for their desired alternatives—then push them to justify them. Give yourself five minutes at the end of class to sum up the discussion and to point out the key learning objectives of the case discussion. Above all, try not to carry a case over to the next class meeting. Students will typically have forgotten it completely by then and all momentum will be lost. If you have to carry it over, summarize the previous discussion and then ask them to write their solution on paper to hand in like a pop quiz. Everyone will want to orally justify their personal solution after they hand in their paper. You will probably have a hard time closing down the discussion!

 7. As a final note, you may wish to tell them what actually happened to the firm in the case (if you know). They enjoy hearing a postscript. Please remind them, however, that there is no one

 best solution and that what actually happened may not have been the best solution. Encourage creativity. Above all, you should start writing some cases. It will give you a lot more confidence as a case discussion leader. Good luck!

 **Exhibit 1**

 **DIFFERENCES BETWEEN THE TYPICAL GRADUATE**

 **AND TYPICAL UNDERGRADUATE CASE COURSE**

 ══════════════════════════════════════════════════════════════

1. Have read the case before class

2. Studied the case, did some basic calculations, and made notes

3. Voluntarily participate in discussion

4. Value of response when called upon

5. Flow of discussion

6. Direction of discussion

7. Application of theory to case

8. Application of business experience to case problems

9. Interest level in case discussion

Grad students

Probably 100%

Probably 60%

Probably 80% at first, then increases to 95%

Usually very good

Once started, can flow on its own with the instructor only steering discussion; Easy to get off on tangents.

First to instructor and then to each other; Willing to attack other points of view and defend own.

Little on own

Lots

30% heavily involved

30% very involved

30% involved

10% watching/waiting

Undergraduates

Probably 70%

Probably 10%

Probably 5% at first, then up to 30% (depends on how long you’re willing to wait them out!)

Usually poor to satisfactory

Needs constant prodding by instructor; Very hard to build momentum; Easy to keep on course.

Typically only to instructor; Rarely criticize other student’s viewpoints; Norm is “Cooperate to graduate.”

Very little on own

Little

10% very involved

20% involved

30% watching

20% reading the case

20% reading the paper

**Student Oral Presentations**

A second approach to using cases is the student oral presentation. This has been used quite successfully by a number of instructors. By the second or third day of class, the students are placed into teams, each composed of three to five people. Each team is then assigned a case to present during the semester. This approach may be used during the second half of the semester if the instructor chooses to lead an open discussion during the first half. It may also be used during the first half instead of open class case discussion if a simulation or project is planned for the second half of the course. Among its advantages are:

* The instructor gets off stage and is no longer responsible for case analysis.

 - The students develop important presentation skills, as well as learn how to handle themselves under pressure during a questioning period.

 - The level of analysis is typically deeper than in the average open class case discussion (unless the instructor is extremely competent in leading cases or the students are unusually motivated to prepare for the discussions).

One critical bit of advice: Coach the first team to make sure it prepares a solid professional presentation. The rest of the class will take their cue from the first team. If it’s done well, the rest will probably go well. If it goes poorly, the rest will tend to be of low quality. The biggest disadvantage of the student oral presentation is that unless something else is assigned, most undergraduates and a large number of graduate students who are not presenting will only superficially read the case. They are likely to hold back from asking any penetrating questions of the presenting group and may choose to skip classes when they are not presenting. If not carefully arranged, the presentations can thus deteriorate into unimaginative speeches aimed at the instructor. We, therefore, recommend that the instructor assigns at least some written analysis to a couple non-presenting teams. The instructor should also give fairly comprehensive feedback to the presenting team within a week of the presentation. We suggest using a form, such as shown in Exhibits 2 and 8. Another idea is to require all students to complete a form critiquing the oral presentation, such as shown in Exhibit 3. Comments may compose a participation grade. We also recommend that you don’t schedule all oral presentations back-to-back. Intersperse them with lectures or open class discussions.

**Written Case Analysis**

There are at least three approaches to use with written case analyses. One is the comprehensive student report that covers all the issues of the case in a complete manner, including references and exhibits (ratios, pro forma financial reports, product life cycle drawings, etc.). A second approach is the short report prepared in response to a specific question, such as, “If the firm continues with its present strategies and objectives, where will it be in 5 years?” A third approach, which we strongly recommend, is the strategic audit. It forces the student to do a complete strategic analysis, as in the comprehensive report, but it is only a three-to-five-page outline and is thus quick to read and easy to grade.

Source: J. D. Hunger, “The Case Method of Teaching: Some Helpful Hints,” *Proceedings, Midwest Society for Case Research* (March 1985): 7.

Both the short report and the strategic audit are useful during the open class case discussion in order to ensure adequate student preparation for class. The instructor’s job as discussion leader is made much easier as students compete with each other to orally “sell” their points of view in class. Good arguments can develop. The instructor may use the blackboard to list the pros and cons of each argument and ask for a student vote on the issues. The short report and the strategic audit are also useful adjuncts to student oral presentations. If two or three teams bring completed reports or audits to class on the same case being presented orally, much more interest is generated in class during the presentation.

 **Exhibit 2**

 **CASE PRESENTATION EVALUATION FORM**

Case Team

 Excellent **+** Acceptable **√** Poor **-**

I. Organization and Presentation of Report

 A. Dress and manner \_\_\_\_\_

 B. Length of report \_\_\_\_\_

 C. Organization of report \_\_\_\_\_

 D. Speaker balance \_\_\_\_\_

 E. Speaking style and use of grammar \_\_\_\_\_

 F. Visual aids and handouts \_\_\_\_\_

II. Contents of Report

 A. Situation Definition

 1. Considered current performance, mission, objectives, etc. \_\_\_\_\_

 2. Considered corporate governance (if applicable) \_\_\_\_\_

 3. Dealt with societal trends \_\_\_\_\_

 4. Dealt with industry opportunities and threats \_\_\_\_\_

 5. Identified internal strengths \_\_\_\_\_

 6. Identified internal weaknesses \_\_\_\_\_

 7. Stated strategic factors clearly and concisely \_\_\_\_\_

 8. Considered both immediate and long term problems \_\_\_\_\_

 B. Situation Analysis

 1. Distinguished between symptoms and underlying problems

 or causes \_\_\_\_\_

 2. Distinguished between fact, opinion, and own inferences \_\_\_\_\_

 3. Recognized all important factors \_\_\_\_\_

 4. Considered the time frame of the case \_\_\_\_\_

 5. Avoided excessive rehash of case facts \_\_\_\_\_

 6. Reflected good understanding of case material \_\_\_\_\_

 7. Brought in outside information as appropriate \_\_\_\_\_

 8. Utilized relevant strategy concepts to aid understanding \_\_\_\_\_

 C. Alternative Assessment

 1. Identified all feasible alternatives \_\_\_\_\_

 2. Alternatives consistent with situation assessment \_\_\_\_\_

 3. Evaluated each alternative in terms of risk, cost, timing,

 etc., as pros and cons \_\_\_\_\_

 D. Recommendation

 1. Clearly presented the recommendation \_\_\_\_\_

 2. Recommendation followed logically from previous analysis \_\_\_\_\_

 3. Provided for implementation of recommended solution,

 including control procedures \_\_\_\_\_

 E. Maintained proper balance among situation definition and

 analysis, alternative assessment, and recommendation \_\_\_\_\_

III. Overall Evaluation

 COMMENTS

 STRENGTHS │ WEAKNESSES

 │

 │

 │

 │

 │

 │

 │

 │

 │

 │

 │

 │

 │

 │

 │

 │

 │

 │

 │

 │

 │

 │

 │

 │

 │

 │

 **Exhibit 3**

 **PRESENTATION APPRAISAL SHEET**

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 (Print Your Name)

Case: \_\_\_\_\_\_

Date Case Presented \_

A. TEAM APPRAISAL (Circle One)

 Excellent Very Good Good Marginal Poor

 Reasons:

═══════════════════════════════════════════════════════════════════════════

B. INDIVIDUAL APPRAISAL (Evaluate Each Person)

 1. \_ \_ \_ \_ \_\_\_\_\_\_\_\_\_\_ (Name) (Evaluation)

 Reasons:

 2. \_ (Name) (Evaluation)

 Reasons:

 3. \_\_\_\_\_\_\_\_\_ (Name) (Evaluation)

 Reasons:

 4. \_ (Name) (Evaluation)

 Reasons:

 The grading of a **written** comprehensive report is often aided through the use of a case evaluation form, such as the one suggested for oral presentations in Exhibits 2 and 8. These forms help to ensure that the instructor considers all aspects of case analysis and provides the students with clear-cut comments on key aspects of the report. Exhibits 2 and 8 can be used for both oral and written reports. In the case of a written report, we recommend modifying Exhibit 2 by replacing the factors in Section I with the following:

 A. Legibility

 B. Length of report

 C. Organization of report

 D. Spelling and use of grammar

 E. Effectiveness of writing style

 F. Use of references and exhibits

###### Structuring the Course

Unless the class is very familiar with the case method, we recommend that the students carefully read Chapter **Thirteen**, Suggestions for Case Analysis. The appendices are especially useful. Given our interest in the strategic decision-making model depicted in Figure 1.5 of Chapter One and the strategic audit provided in Appendix 1.A of Chapter One, we prefer to begin case analysis in the strategy class with a consideration of **Corporate Governance, Ethics, Privacy and Social Responsibility**. Consequently, we like to begin with an open class discussion of **Cases 1, 2, 3, 4, 5, and 6**. These cases serve to set the stage for the more comprehensive strategic management cases to follow.

**Cases 9-34** typically deal with many aspects of strategic management and (for the most part) are equally appropriate for oral presentations, written reports, and strategic audits. They deal with general issues in strategic management and can be assigned depending on the steps they emphasize in the strategic decision-making process or on the basis of difficulty or complexity. They range from large business corporations to small, entrepreneurial firms and not-for-profits, and are organized for the most part on the basis of industry.

Some of the cases can be used in conjunction with other cases, to emphasize a particular issue or strategy, such as growth through acquisitions, retrenchment, or entrepreneurial ventures. For example, **Snap-On Tools (#33), Zynga (#17), Panera Bread (#19), Sonic Restaurants (#22),** **Groupon (#14), TomTom (#31),** and **Amazon (#12)** portray the importance of innovation to create competitive advantage in both entrepreneurial ventures and growing established firms. Environmental factors, such as changing demographics, negative feelings about “big business,” government regulations, and cultural values, respectively, are important issues in the **Best Buy (#27), Pepsi (#23), GE Capital** **(#32),** and **J.C. Penney** **(#26)** cases.

**International/global issues** can be emphasized using the **Harley Davidson (#9)** and **Uber (#10)** cases. Uber deals with international entry strategies. Other cases of corporations with strong international aspects are **TomTom (#31), Blue Nile (#13), Toms Shoes (#25)** and **Snap-On Tools (#33).**

Cases dealing with fast-growing **entrepreneurial ventures** are **Pandora Media (#11), Panera Bread (#19), Whole Foods (#20), Tesla (#30), Under Armour (24)** and **TomTom (#31).** These cases can be contrasted against larger, more **established companies,** whose founders have departed, such as **GE (#32)** and **J.C. Penney (#26).**

Categorizing Cases by Strategic Decision-Making Process. **Exhibit 4** is a matrix showing the eight steps of the strategic decision-making process for each of the 33 cases in this Case Instructor’s Manual. This will provide you with some guidance if you prefer to emphasize strategy formulation in the beginning of the course and implementation, evaluation, and control toward the end of the course.

## Exhibit 4: STEPS COVERED IN STRATEGIC DECISION-MAKING PROCESS

|  |  |  |
| --- | --- | --- |
| Strategy Formulation | **Strategy****Implementation** | **Evaluation & Control** |
| **Performance** | **Strategic Posture** | **Corporate Governance** | **External Factors** | **Internal Factors** | **Strategic Factors** | **Review Mission & Objectives** | **Alternatives** |  |  |
| **1A** | **1B** | **2** | **3** | **4** | **5A** | **5B** | **6** | **7** | **8** |

**Exhibit 4**

**CLASSIFICATION OF CASES BY STEPS IN STRATEGIC DECISION-MAKING PROCESS**

**Steps 1-6** are **strategy formulation**; **Step 7** is **strategy implementation**; and **Step 8** is **evaluation and control**. See the figure on the previous page for an explanation of individual steps.

══════════════════════════════════════════════════════════════════════════

 **(Emphasized = o; Covered = x)**

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **CASE** | **1A** | **1B** | **2** | **3** | **4** | **5A** | **5B** | **6** | **7** | **8** |
| **1. Recalcitrant Director** | X |  | O | O |  | X |  | O | X |  |
| **2. Wallace Group** | X | O | O | X | O | O | X | X | O | X |
| **3. Everyone Does It** |  |  | X | O | X |  |  |  | X | O |
| **4. The Audit (mini)** |  |  |  | O | O |  |  |  | X | O |
| **5. Early Warning: Concussion Risk** |  |  |  | X | O |  |  |  |  |  |
| **6. American Red Cross** |  |  | O |  |  |  |  |  |  |  |
| **7. Chipotle** | X | X |  | X | X | X |  |  | X |  |
| **8. Google**  |  |  |  |  |  |  |  |  |  |  |
| **9. Harley-Davidson** | X | X |  | X | X | X | O | O | X |  |
| **10. Uber** | X | X |  | O | X | X |  |  | X |  |
| **11. Pandora Media** | X | O | X | O |  | O |  | O | X | X |
| **12. Amazon** | O | O | X | O | X | O |  | O | X | X |
| **13. Blue Nile** | X | O | X | O | O | O |  |  | X |  |
| **14. Groupon** | O | X | X | O | X | O | X |  |  | O |
| **15. Netflix** | O | O | X | X | O | O | X | O | O | X |
| **16. Town Sports Int’l** |  | O | X | X | X | O | O | O | X | X |
| **17. Zynga** | O | X | X | X | X | X | X | X | X | X |
| **18. Boston Beer (mini)** |  |  |  |  |  |  |  |  |  |  |
| **19. Panera Bread** | O | O | O | X | O | O | X | X | X | O |
| **20. Whole Foods** | O | O | X | O | O | O | X |  | O | O |
| **21. Burger King (mini)** |  |  |  |  |  |  |  |  |  |  |
| **22. Sonic Restaurants** | X | X |  |  | O | X | X | X | X | O |
| **23. Pepsi** |  |  |  |  |  |  |  |  |  |  |
| **24. Under Armour** | X | O |  | O | X | X | X | X | X |  |
| **25. Toms Shoes (mini)** |  |  |  |  |  |  |  |  |  |  |
| **26. J.C. Penney** | X | X |  |  | O | X | X | X | X | O |
| **27. Best Buy** | X | O |  | X | X | O |  | X | X |  |
| **28. Target** | X | X |  | O | O | X |  |  | X | X |
| **29. Staples** | X | X |  | X | O | X | O | O |  |  |
| **30. Tesla Motors** | X | X | X | O | O | O |  | O | X |  |
| **31. Tom-Tom** | X | O | X | O | X | O |  | O | X | X |
| **32. GE Capital** | O | O | X | O | O | O |  | O | X | O |
| **33. Snap-On Tools** |  |  |  | O | O | X | X | O |  |  |
|  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |

**Categorizing Cases by Level of Difficulty**.

Although we like to cover the corporate governance/executive leadership and social responsibility/ethics cases (cases 1-5) early in the course, you may wish to cover them at another time. We recommend that you consider assigning cases on the basis of their level of difficulty /complexity. We categorize these cases into the following three groups:

 **Cases to use early.** These cases are generally short, relatively easy to analyze, and tend to generate a good level of student interest and enthusiasm. Number-crunching is reasonably low.

|  |  |
| --- | --- |
| **CASE** |  **#** |
| **Recalcitrant Director at Byte** | **1** |
| Google | **8** |
| Early Warning: Concussion Risk | **5** |
| **The Audit** | **4** |
| **Everyone Does It** | **3** |
| American Red Cross | **6** |
| Boston Beer | **18** |
| **Toms Shoes** | **25** |
| **Wallace Group** | **2** |
| **Pepsi** | **23** |

 **Cases to use at mid-point.** These cases tend to be a little more complicated and involve more number-crunching or analysis.

|  |  |
| --- | --- |
| **CASE** | **#** |
| **Pandora Internet Radio** | **11** |
| **Tom-Tom** | **31** |
| Under Armour | **24** |
| Best Buy | **27** |
| Groupon | **14** |
| **Zynga** | **17** |
| **Panera Bread** | **19** |
| **Harley Davidson** | **9** |
| **Uber** | **10** |
| **Chipotle** | **7** |

**Cases to use late.** These cases are generally very complicated and fairly difficult to analyze. They require a lot of analysis and number-crunching.

|  |  |
| --- | --- |
| **CASE** | **#** |
| **Town Sports International** | **16** |
| **Snap-On Tools** | **33** |
| **Sonic Restaurants** | **22** |
| **GE Capital** | **32** |
| **Tesla Motors** | **30** |
| **Target** | **28** |
| **Staples** | **29** |
| **Amazon** | **12** |

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Mini-Cases**. In addition to the full cases discussed above, the book includes seven mini-cases and one industry note. These cases are fairly short and require students to do research on the Internet to obtain environmental, corporate, and financial information that is not included with the case. These mini-cases are **Pepsi (#23), The Audit (#4)**, **Boston Beer Company (#18), TOMS Shoes (#25), Burger King (#21),** and **Whole Foods Market (#20).**

**Options for Mini-Cases**

We suggest four options in using the Internet Research Mini-Cases:

**Option 1 Lectures**

Instructors can use each case as the basis of a lecture, in which he or she integrates the textual material in the chapters with a specific case.

**Option 2 Quiz**

Instructors can give students 10-15 minutes to read a mini-case and then give a quiz based on the issues in the case.

* After the quiz, the instructor can lead a discussion of the key issues in the case or tie the case to the topic under discussion.
* The quiz gets the class on even footing—everyone is prepared for class discussion.

**Option 3 Internet Research—Long Form**

Instructors can have students perform Internet research for a mini-case based on specific chapters using the Strategic Audit:

**Chapter Strategic Audit Section Topic**

 **1 I Current Situation**

 **2 & 3 II Corporate Governance**

 **4 III External Environment (O & T)**

 **5 IV Internal Environment (S & W)**

 **6 V Analysis of Strategic Factors (SWOT)**

**6, 7, 8 VI Strategic Alternatives & Choice**

**9 & 10 VII Strategy Implementation**

**11 & 12 VIII Evaluation & Control**

Have teams of students gather the following information:

* **Annual Report**
* **SEC Form 10-K**
* **Annual Shareholders Proxy Statement**
* **Competitive/Industry Information**
* **Articles on the company, industry, competition**

We suggest that students be required to provide a copy of all the information cited in the research.

**Option 4 Internet Research—Short Form**

The instructor can select and assign particular sections of the Strategic Audit to be researched.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Course Outlines**

A number of policy instructors, including us, have a strong bias in favor of 75-minute classes meeting twice a week. Open class discussion, or oral presentations of complex strategic management cases, usually demand at least an hour’s worth of time. Given the usual rigmarole involved in starting and ending a class, it is very difficult to handle a case well in a 50-minute period unless the case is analyzed over two class sessions. Nevertheless, we provide possible course outlines for both kinds of classes. Another variable is the semester versus the quarter. We provide outlines in Exhibits 5, 6, and 7 for the semester system and assume that they can be reduced for a quarter system course simply by not using a second half management simulation or a team project and by adjusting the number of cases accordingly.

One other variable, which complicates the development of a course outline, is the decision concerning the timing of the lectures on strategic management. Some instructors choose to spend the first part of the course lecturing over the book while the students quickly read the chapters. Others attempt to intersperse lectures with case discussions or presentations. The key question seems to be: How much information do students need before they can competently analyze their first comprehensive strategic management case? This is completely up to the instructor. We believe that a use of the strategic audit will help students to competently analyze their first comprehensive case even if they have not gone beyond Strategy Formulation. We have found Chapter Eight to be a good time to begin oral presentations, for example. The first case should, however, emphasize strategy formulation and be reasonably easy to analyze with each following case increasing in difficulty.

**EXHIBIT 5**

 **COURSE OUTLINE FOR 30 CLASS MEETINGS OF 75 MINUTES EACH**

**DAY ACTIVITY**

 **1** **Introduction; discuss syllabus**

 **2** **Lecture/discussion of** ***Chapter One***

 **3** **Lecture/discussion of** ***Chapter Two***

 **4** **Class discussion of a corporate governance case (#1, 2, 3) form teams for oral presentations**.

 **5** **Lecture/discussion of** ***Chapter Three***

 **6** **Class discussion of an ethics/social response** **case** **(#4,**

 **5,6)**

 **7** **Lecture/discussion of *Chapter Four***

 **8** **Class discussion of an industry issue**

 **9** **Lecture/discussion of** ***Chapters Five* and *Thirteen***

**10**  **Class discussion of a case for early part of course**

**11** **Lecture/discussion of** ***Chapter Six***

**12** **Class discussion of a case for early part of course**

**13** **Lecture/discussion of** ***Chapter Seven***

**14** **Class discussion of a case for the early part of course**

**15 Mid-term Exam**

**16** **Lecture/discussion of** ***Chapter Eight***

**17**  **Oral team presentation 1**

**18 Lecture/discussion of *Chapter Nine***

**19** **Oral team presentation 2**

**20 Lecture/discussion of *Chapter Ten***

**21** **Oral team presentation 3**

**22 Lecture/discussion of *Chapters Eleven and Twelve***

**23** **Oral Team presentation 4**

**24 Lecture/discussion of a fairly difficult case**

**25** **Oral team presentation 5**

**26 Lecture/discussion of a fairly difficult case**

**27 Oral team presentation 6**

**28 Lecture/discussion of a fairly difficult case**

**29 Review of a difficult case**

**30 Final exam**

 **EXHIBIT 6**

 **COURSE OUTLINE FOR 30 CLASS MEETINGS OF 75 MINUTES EACH**

 **(WITH simulation or project at end)**

**DAY ACTIVITY**

 **1** Introduction; discuss syllabus; lecture/discussion of ***Chapter One***

 **2** Lecture/discussion of ***Chapter Two***

 **3** Open class discussion of a governance case

 **4** Lecture/discussion of ***Chapter Three***

 **5** Open class discussion of an ethics/social responsibility case

 **6** Lecture/discussion of ***Chapters Four*** and ***Thirteen (Case Analysis Overview)***

 **7** Open class discussion of a case appropriate for the early part of the course

 **8** Lecture/discussion of ***Chapter Five***

 **9** Open class discussion of a case appropriate for the early part of the course

**10** Lecture/discussion of ***Chapters Six***

**11** Open class discussion or oral presentation of a case appropriate for the midpoint of the course

**12** Lecture/discussion of ***Chapters Seven*** and ***Eight***

**13** Open class discussion or oral presentation of a case appropriate for the midpoint of the course

**14** Lecture/discussion of ***Chapter Nine and Ten***

**15** Open class discussion or oral presentation of a more difficult case appropriate for the later part of course

**16** Lecture/discussion of ***Chapters Eleven*** and ***Twelve***

**17** Open class discussion or oral presentation of a fairly difficult case

**18** Lecture/discussion of Case

**19** Open class discussion or oral presentation of a technology case

**20** Lecture/discussion of Case

**21** Open class discussion or oral presentation of a difficult case appropriate to the late part of the course

**22** Mid-term exam (test or written case analysis)

* 1. Management simulation or team projects

**EXHIBIT 7**

 **COURSE OUTLINE FOR 45 CLASS MEETINGS OF 50 MINUTES EACH**

 **(With or without simulation or presentations at end)**

**DAY ACTIVITY**

 **1** Introduction: discuss syllabus

 **2** Lecture/discussion of ***Chapter One***

 **3** Lecture/discussion of ***Chapter Two***

 **4** Class discussion of a corporate governance case

 **5** Lecture/discussion of ***Chapter Three***

 **6** Class discussion of an ethics/social responsibility case

 **7** Lecture/discussion of ***Chapter Four***

 **8** Class discussion of an industry oriented case

 **9** Lecture/discussion of ***Chapters Five and Thirteen (Case Analysis)***

**10** Class discussion of a case for early part of course

**11** Lecture/discussion of ***Chapter Six***

**12** Class discussion of a case for early part of course

**13** Lecture/discussion of ***Chapter Seven***

**14** Class discussion of a case for early part of course

**15** Lecture/discussion of **Chapter *Eight***

**16** Class discussion of a case appropriate for the course mid-point

**17** Continuation of case discussion

**18** Lecture/discussion of ***Chapter Nine***

**19** Class discussion of a case appropriate for the course mid-point

**20** Continuation of case discussion

**21** Lecture/discussion of ***Chapter Ten***

**22** Class discussion of a case appropriate for the course mid-point

**23** Lecture/discussion of ***Chapter Eleven***

**24** Mid-term exam

**25** Lecture/discussion of ***Chapter Twelve***

**26** Lecture/discussion of Case

**27** Class discussion of a technology case

**28** Lecture/discussion of Case

**29** Class discussion of a complex entrepreneurship case

**30** Continuation of case discussion

**31** Lecture/discussion of Case

**32** Discussion of a not-for-profit case

**33–45** Class sessions for simulation or team presentations

**Exhibit 8**

**CASE ANALYSIS EVALUATION FORM**

**Case \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

 Excellent **+** Acceptable **√** Poor **-**

**I. CURRENT SITUATION**

 A. Performance \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ B. Strategic Posture \_\_\_\_\_\_\_\_\_\_

**II. CORPORATE GOVERNANCE**

 A. Board of Directors \_\_\_\_\_\_\_\_\_\_\_\_ B. Top Management \_\_\_\_\_\_\_\_\_\_\_\_\_

**III. EXTERNAL ENVIRONMENT**

 A. Societal—Overall \_\_\_\_\_\_\_\_\_\_\_\_

Socio-cultural \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Economic \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Geo-Political-Legal \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Technological \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 B. Task (Industry)—Overall \_\_\_\_\_\_

Stage of Development \_\_\_\_\_\_\_\_\_\_\_ Threat of New Entrants \_\_\_\_\_

Bargaining Power-Buyers \_\_\_\_\_\_\_\_ Threat of Substitutes \_\_\_\_\_\_

Bargaining Power-Suppliers \_\_\_\_\_ Rivalry \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**IV. INTERNAL ENVIRONMENT**

 A. Structure \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ B. Culture \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 C. Resources: Overall \_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Marketing \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 2. Finance \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3. R&D \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 4. Operations \_\_\_\_\_\_\_\_\_\_\_\_\_\_

5. Human Resource Mgmt \_\_\_\_\_\_\_\_\_\_ 6. Info Systems \_\_\_\_\_\_\_\_\_\_\_\_

**V. ANALYSIS OF STRATEGIC FACTORS**

 SWOT Summary/Overall Assessment \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Exhibit 8 (Continued)**

**VI. STRATEGIC ALTERNATIVES AND RECOMMENDED STRATEGY**

 A. STRATEGIC ALTERNATIVES

Clearly Presented 3 Mutually Exclusive Alts \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Discussed Pros & Cons of Each Alt \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 B. RECOMMENDATION

Clearly Stated Alt Selected \_\_\_\_\_\_\_ Provided Rationale \_\_\_\_\_\_

**VII. IMPLEMENTATION**

 A. Deal with Each Strategic Factor \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 B. Priority System \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**VIII. EVALUATION AND CONTROL**

* Who sets it up \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Who reviews \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* How often \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* What reviewed (e.g., ROI, EPS, Turnover) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

=======================================================================

**A. REQUIRED EXHIBITS**

EFAS \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

IFAS \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

SFAS \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

PORTER \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

RATIOS \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

SCENARIO \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**B. OTHER EXHIBITS**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

=======================================================================

**GRADE/ASSESSMENT:**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_