

### COURSE INFORMATION

Course title:	Business Strategy Integration (BSI): Foundation		
Course code:	BA 504	Credits:	3
Session, term, period:	2020W Term 2 Periods 1&2	Class location:	Zoom
Sections:	001, 002	Class times:	<i>Variable... see schedule below</i>
Course duration:	Jan 18 – Apr 19, 2021		
Program:	FT MBA		

### COORDINATOR INFORMATION

Instructor:	Greg Werker, PhD		
Email:	greg.werker@sauder.ubc.ca	Office hours:	<i>by appointment</i>

### ACKNOWLEDGEMENT

UBC's Point Grey Campus is located on the traditional, ancestral, and unceded territory of the x<sup>w</sup>məθk<sup>w</sup>əyəm (Musqueam) people, who for millennia have passed on their culture, history, and traditions from one generation to the next on this site.

### COURSE DESCRIPTION

Learning about concepts in a theoretical manner, in isolation from other subject concepts, and by oneself, is relatively simple. The real value and higher-level learning comes from integration and application of the concepts to real and often messy problems, in a team. BA 504 BSI: Foundation is meant to simulate this team-based, somewhat unstructured, cross-functional environment you will find in your careers after you graduate.

To this end, we have woven applied integration challenges throughout the program. For all students, these occur in BA 504 (this course) as a foundation to Business Strategy Integration. This then flows into BA 507 BSI: Global (GIE: Global Immersion Experience) when you have the added challenges of a new cultural context and shorter timelines. Many students will have courses that also offer similar integration challenges. In the summer we have BA 512 BSI: Experiential Learning summer internship or entrepreneurship project. At the end of the program, you will have had considerable practice working in teams to solve a large variety of business problems and can apply these skills to your BA 508 BSI: Capstone class to wrap-up the program.

### COURSE FORMAT

This course focuses on enabling professional development by enhancing students' ability to integrate different functional learning from all courses within a strategic analysis and decision-making framework. It consists of three integrated cases, a fourth "live" case, and a project. The course runs through periods 1 and 2, providing a foundation for the rest of the program.

In this course, when we say "integrated" we mean thinking holistically about problems, and along three dimensions: (a) across functional disciplines, (b) across institutional perspectives (business, government, civil society) to facilitate the creation of shared value, and (c) across geographies and different business cultures and contexts.

## LEARNING OBJECTIVES

The activities in this course help students develop:

**Knowledge:** to bring together the basic concepts, ideas and methods from the full range of managerial disciplines interpreted in the broadest possible way to include, for example, not only finance and economics, but also business ethics, marketing, operations, organizational behavior, environmental sustainability, and interpersonal psychology.

**Skills:** to sharpen a broad range of skills essential to effective and responsible management, including (a) problem solving in both simple situations (say, with data analysis and statistics) and complex situations (where relevant facts and theories from different disciplines must be integrated in order to make an insightful decision), (b) skills of leadership, teamwork, and interpersonal relations, and (c) skills in both written and verbal communication.

Students will be able to ...

1. Analyze and discuss complex managerial decisions and situations from multiple angles.
2. Discuss how a culture of leadership, responsibility, teamwork, and community can be transferred to future ventures.
3. Demonstrate good communication and teamwork skills.
4. Explain a base of business knowledge, integrating from different functional areas, and use various strategy frameworks to assess, critique, and improve a business model for a given organization.
5. Undertake a discovery meeting with a client organization and frame the terms of reference for a project. Undertake competitor and customer research including primary and secondary research methods.

## ASSESSMENTS

### Summary

<u>Component</u>	<u>Weight</u>
Attendance	5%
Case 1 group memo (Westlake Lanes)	10%
Case 2 group presentation (POE)	10%
Case 3 individual memo (Zara)	10%
Live case group memo (lululemon)	10%
Live case group presentation	10%
Project — early research findings	5%
Progress review	5%
Presentation practice run	5%
Project report	15%
Project presentation	<u>15%</u>
Total	100%

### *Details of Assessments*

**Attendance:** Students who display repeated tardiness and/or absences will lose 0.5% for each late arrival and 1% for each missed class.

**Case 1:** This memo is to be completed in your BSI groups.

**Case 2:** This case involves creating and giving a presentation. Details will be posted on Canvas closer to the day. There is no written memo for case 2. All group members are expected to participate in creating the deliverable, and all group members should speak for roughly equal amounts of time during the presentation. How you divvy up the work and the different parts of the presentation is up to you.

**Case 3:** This memo is to be completed individually. All of the analyses and the write-up must be your own work.

**Live case (case 4):** This memo and presentation will be completed in your BSI groups. You will receive the company materials and the assignment 2 weeks prior to the event. All group members are expected to participate in creating the deliverable, and all group members should present for roughly equal amounts of time.

**Format for case memos (case 1, 3, 4):** *Your memos should be 2 pages, plus up to 2 pages of appendices. You do not need to include a title page. Pay attention to your use of white space, clear headings, and properly labelled figures/tables; bullets are reasonable but don't overuse them. There should be no typos, spelling mistakes, or other errors. Make sure you submit your memo as a PDF.*

**Project:** You will work on your project with your BSI group, and (depending on the company) there may be an opportunity to coordinate with other groups working with the same company (e.g., to ensure each group focuses on a different aspect of the problem). The project has multiple deliverables:

**Early Research Findings:** There will be a 15-minute individual in-class writing assignment at the start of Workshop 2. Each group member should be able to answer basic questions about what was discussed at the initial meeting with the company, what information they gave you, what information you are still waiting for, and what alternatives are being considered at this stage. As well, there may be questions about what research you have conducted so far (e.g., topics, questions, databases, search terms, and what type of materials are available).

**Project progress review:** The progress review is an opportunity to refine the introduction, to clearly identify the issue, and to lay out your plan for completing the rest of the work.

Suggested outline:

- Intro / Issue identification.
- What you think the alternatives are and/or what the analyses will consist of.
- Tasks / timeline:
  - what you have accomplished thus far (be honest).
  - remaining tasks with due dates and who is responsible.
- Any concerns / issues / factors to mention (and how you might deal with these).

*Guidelines:*

- *Length — probably under 3 pages.*
- *The Intro / Issue section should be written in paragraph form. Hint: think of this section as a draft for your report.*
- *For the remaining three sections, use sentences, bullets, tables, or whatever structure best conveys the information.*

**Presentation practice run:** Groups are expected to have a version of their presentation ready for Workshop 4.

**Project report:** In addition to being graded, this deliverable will be shared with the company you're working with. It should assume some basic knowledge of the problem and the company, however, the main audience is the course instructors (and the grader). Therefore you may wish to provide some background information to give context. There is no page limit: The report should be as long as it needs to be while still being concise. Because each project has different requirements and deliverables, there is no set format you should follow.

**Project presentation:** Presentations will be given on the final day to a representative from your company. They will be graded by a Sauder judge, and feedback from the company may be incorporated into the grade. All group members are expected to present.

**iPeer Evaluations:** At several points during this course you will be asked to provide an evaluation of your group members' contributions. These evaluations are required (unless listed as optional). Failure to provide an iPeer evaluation by the iPeer deadline will result in a penalty of 1% on your individual final grade (for each missed evaluation). Suggestions for providing helpful and constructive feedback will be discussed in class.

Note that iPeer evaluations will be shared with your group members.

### LEARNING MATERIALS

**Reading Materials:** The three cases, materials related to the live case, and materials provided by the companies for the projects. Two of the cases (Westlake, Zara) must be purchased from Ivey Publishing. All information will be posted on Canvas.

**Other Learning Resources:** Library resources, library databases, articles, and other related materials.

### COURSE-SPECIFIC POLICIES AND RESOURCES

#### *Missed or late assignments, and regrading of assessments*

Late submissions will not be accepted and will receive a grade of zero.

#### *Academic Concessions*

If extenuating circumstances arise, please contact the RHL Graduate School program office as early as reasonably possible, and submit an [Academic Concession Request & Declaration Form](https://webforms.sauder.ubc.ca/academic-concession-rhlee) <https://webforms.sauder.ubc.ca/academic-concession-rhlee>. If an academic concession is granted during the course, the student will be provided options by RHL, or by the instructor in consultation with RHL, per [UBC's policy on Academic Concession](#).

### *Feedback*

You will receive feedback in a variety of forms in this class. If, at any time, you feel that the feedback is insufficient, unhelpful, or confusing, please speak with one of your instructors. The following activities are all opportunities for feedback:

**Group work:** When working with your group on a case or on the project, you are expected to learn from each other. The act of creating a case memo, a presentation, or a report is an excellent opportunity to informally receive feedback on your ideas from your peers.

**iPeer:** Your group members will provide feedback at multiple times through the use of iPeer.

**Group feedback session:** Early in the course there will be a session on how to provide and receive feedback. During exercises in this session you will provide, receive, and discuss feedback with your group members.

**Case debrief class:** After handing in case memos (Case 1 group memo, Case 3 individual memo) the case debrief class is an opportunity to learn more about different ways to approach the case, to see how what you did fits in with the instructors' presentation/discussion of the case, and to get ideas about what you might have done differently. You are encouraged to take notes during these sessions.

**Grades:** We will make every effort to return assessments within one week of when they are due (with the exception of Case 3, the individual memo, which may take up to two weeks due to the volume of memos). This written feedback on these cases is intended to augment the other types of feedback (e.g., group work, case debrief) and may provide you with additional perspectives.

**Presentation feedback:** You will receive feedback on presentations following each. As well, you will receive feedback from an instructor on your project presentation practice run. All of this feedback will focus on individual presentation styles as well as group dynamics and overall effectiveness of the presentation.

## **POLICIES APPLICABLE TO COURSES IN THE ROBERT H. LEE GRADUATE SCHOOL**

### *Attendance*

Excepting extenuating circumstances, students are expected to attend 100% of their scheduled class hours. Absent students limit their own academic potential, and that of their classmates, and cause unnecessary disruption to the learning environment. Students missing more than 20% of the total scheduled class hours for a course (including classes held during the add/drop period) without having received an academic concession will be withdrawn from that course. Withdrawals, depending on timing, could result in a "W" or an "F" standing on the transcript.

### *Punctuality*

Students are expected to arrive for classes and activities on time and fully prepared to engage. Students arriving later than halfway through a scheduled class will be treated as absent for that class.

### *Electronic Devices*

During online lectures, students are not permitted to use any electronic devices other than the primary one used for attending the online lecture (e.g. laptop or desktop). Only Zoom should be open during the online lecture unless an instructor advises the use of another device or application for an in-class

activity. Feedback from students indicates that personal devices are the number one distraction from effective learning and participation in the online learning environment.

#### *Citation Style*

Please use the American Psychological Association (APA) reference style to cite your sources.

Details of the above policies and other RHL Policies are available at:

<http://www.calendar.ubc.ca/vancouver/index.cfm?tree=12,199,506,1625>

#### UNIVERSITY POLICIES AND RESOURCES

UBC provides resources to support student learning and to maintain healthy lifestyles but recognizes that sometimes crises arise and so there are additional resources to access including those for survivors of sexual violence. UBC values respect for the person and ideas of all members of the academic community. Harassment and discrimination are not tolerated nor is suppression of academic freedom. UBC provides appropriate accommodation for students with disabilities and for religious observances. UBC values academic honesty and students are expected to acknowledge the ideas generated by others and to uphold the highest academic standards in all of their actions. Details of the policies and how to access support are available on the UBC Senate website at <https://senate.ubc.ca/policies-resources-support-student-success>.

#### *Respect for Equity, Diversity, and Inclusion*

The UBC Sauder School of Business strives to promote an intellectual community that is enhanced by diversity along various dimensions including status as a First Nation, Metis, Inuit, or Indigenous person, race, ethnicity, gender identity, sexual orientation, religion, political beliefs, social class, and/or disability. It is critical that students from diverse backgrounds and perspectives be valued in and well-served by their courses. Furthermore, the diversity that students bring to the classroom should be viewed as a resource, benefit, and source of strength for your learning experience. It is expected that all students and members of our community conduct themselves with empathy and respect for others.

#### *Academic Integrity*

The academic enterprise is founded on honesty, civility, and integrity. As members of this enterprise, all students are expected to know, understand, and follow the codes of conduct regarding academic integrity. At the most basic level, this means submitting only original work done by you and acknowledging all sources of information or ideas and attributing them to others as required. This also means you should not cheat, copy, or mislead others about what is your work. Violations of academic integrity (i.e., misconduct) lead to the breakdown of the academic enterprise, and therefore serious consequences arise and harsh sanctions are imposed. For example, incidences of plagiarism or cheating may result in a mark of zero on the assignment or exam and more serious consequences may apply if the matter is referred to the President's Advisory Committee on Student Discipline. Careful records are kept in order to monitor and prevent recurrences.

#### *Academic Freedom and Students Studying from Outside Canada*

During this pandemic, the shift to online learning has greatly altered teaching and studying at UBC, including changes to health and safety considerations. Keep in mind that some UBC courses might cover topics that are censored or considered illegal by non-Canadian governments. This may include, but is not limited to, human rights, representative government, defamation, obscenity, gender or sexuality, and historical or current geopolitical controversies. If you are a student living abroad, you will be subject to

the laws of your local jurisdiction, and your local authorities might limit your access to course material or take punitive action against you. UBC is strongly committed to academic freedom, but has no control over foreign authorities (please visit <http://www.calendar.ubc.ca/vancouver/index.cfm?tree=3,33,86,0> for an articulation of the values of the University conveyed in the Senate Statement on Academic Freedom). Thus, we recognize that students will have legitimate reason to exercise caution in studying certain subjects. If you have concerns regarding your personal situation, consider postponing taking a course with manifest risks, until you are back on campus or reach out to your academic advisor to find substitute courses. For further information and support, please visit: <http://academic.ubc.ca/support-resources/freedom-expression>

### COPYRIGHT

All materials of this course (course handouts, lecture slides, assessments, course readings, etc.) are the intellectual property of the instructor or licensed to be used in this course by the copyright owner. Redistribution of these materials by any means without permission of the copyright holder(s) constitutes a breach of copyright and may lead to academic discipline and could be subject to legal action. Any lecture recordings are for the sole use of the instructor and students enrolled in the class. In no case may the lecture recording or part of the recording be used by students for any other purpose, either personal or commercial. Further, audio or video recording of classes are not permitted without the prior consent of the instructor. Students may not share class Zoom links or invite others who are not registered to view sessions.

### ONLINE TEACHING TOOL & REQUIREMENTS

This course will be taught using Zoom for synchronous classes and office hours.

For this course, you are required to use a Zoom account during synchronous classes and office hours. If you do not have a Zoom account, you can create one here: <https://zoom.us/signup>. Note: creating a Zoom account requires that you provide a first name, last name, and email address to Zoom. For privacy purposes, you may consent to using your existing email address and your real name. Alternatively, if you prefer, you may sign up using an alternative email address and an anonymized name that does not identify you (i.e. Jane Doe, [jane.doe@email.com](mailto:jane.doe@email.com)). If you have trouble creating an account, or accessing a Zoom session, please contact [CLCHelp@sauder.ubc.ca](mailto:CLCHelp@sauder.ubc.ca). You will be required to provide the email address associated with your Zoom account in a Canvas quiz for identification purposes.

To help replicate the classroom experience, make sessions more dynamic and hold each person accountable, both students and instructors are required to have their cameras on during Zoom sessions. Students who require an accommodation with regard to the “camera on” requirement must contact their instructors in advance of the first class to discuss options. As professional graduate students, students are expected to conduct themselves professionally by joining sessions on time, muting mics when not speaking, refraining from using any other technology when in-session, attending in business casual dress (at a minimum), and participating from a quiet environment. Content from synchronous sessions will be selectively recorded per instructor discretion and made available to students on Canvas for a maximum duration of the course length. This is done to allow students the opportunity to return to lecture content to solidify learnings.

**COURSE SCHEDULE**

*(Subject to change with class consultation)*

Date Location	CLASS TOPICS	ACTIVITIES / READINGS	DELIVERABLES
Jan 14 (O week)	<b>Case Method</b> (Darren Dahl)	Be prepared to take notes.	
Jan 22 7am–11am	<b>Case 1 — Westlake Lanes</b> (Jenny Dickson & Scott Sinclair)	<b>Westlake Lanes case</b> Be prepared to discuss in class.	Case 1 due 7:30am Jan 21. iPeer due 11pm Jan 23.
Jan 29 7am–11am	<b>Case 2 — Pacific Office Elegance</b> (Tracey Gurton & Greg Werker)	<b>POE case</b> Details for the day to be posted on Canvas	Everyone arrives at <b>7am</b> , ready to receive the case and work in different teams. iPeer due 11pm Jan 30.
Asynch.	<b>Strategy Toolkit</b> (Greg Werker)	In-class activities Blue Ocean Strategy and Business Model Canvas model.  Group feedback session.	
Feb 5 7am–11am	<b>Workshop 1 — Intro to Projects</b> (Tracey Gurton, DJ Miller, Steven Minns, Greg Werker)	Introduction to projects. Library research skills. Communication skills teaser.	
Feb 12 8am–12pm	<b>Case 3 (individual) — Zara</b> (Tim Silk)	<b>Zara Case</b> Be prepared to discuss in class.	Case 3 due 7:30am Feb 11.
Mar 5 7am–11am	<b>Workshop 2 — Projects</b> (Tracey, DJ, Steve, Greg)	Work on projects. Communication skills. Library research in groups.	Early Research Findings to be completed individually in class.
Mar 12 8am–12:30pm	<b>Case 4 (live case) — lululemon</b>	<i>(details to be posted on Canvas)</i>	Memo due 7:30am Mar 10. Slides due 7:30am Mar 11. iPeer optional 11pm Mar 13.
Mar 19 8am–12pm	<b>Workshop 3 — Projects</b> (Tracey, DJ, Steve, Greg)	Work on projects. Feedback on live case presentations. Group check-in based on iPeer feedback.	Progress Review due 7:30am <b>Wednesday</b> , Mar 17
Mar 26 8am–12pm	<b>Workshop 4 — Projects</b> (Tracey, DJ, Steve, Greg)	Presentation practice run. Work on projects.	
Apr 19	<b>Final Project Presentations</b>	<i>(details to be posted on Canvas)</i>	Report due 7:30am Apr 17. Slides due 7:30am Apr 18. iPeer due 11pm Apr 20.