

### COURSE INFORMATION

|                               |   |                        |                           |
|-------------------------------|---|------------------------|---------------------------|
| <b>Course title:</b>          | Business Strategy Integration (BSI): Foundation |                        |                           |
| <b>Course code:</b>           | BA 504  | <b>Credits:</b>        | 3                         |
| <b>Session, term, period:</b> | 2022W Term 1 Periods 1&2                        | <b>Class location:</b> | <i>See schedule below</i> |
| <b>Sections:</b>              | 001, 002  | <b>Class times:</b>    | <i>See schedule below</i> |
| <b>Course duration:</b>       | Aug 31 – Dec 12, 2022                           |                        |                           |
| <b>Program:</b>               | FT MBA  |                        |                           |

### COORDINATOR INFORMATION

|                    |  |                      |                       |
|--------------------|--|----------------------|-----------------------|
| <b>Instructor:</b> | Sabrina Rai, CPA, MPAcc, BCom  |                      |                       |
| <b>Email:</b>      | <a href="mailto:sabrina.rai@sauder.ubc.ca">sabrina.rai@sauder.ubc.ca</a> | <b>Office hours:</b> | <i>by appointment</i> |

### ACKNOWLEDGEMENT

UBC's Point Grey Campus is located on the traditional, ancestral, and unceded territory of the xʷməθkʷəy̓əm (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 "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*

| Component                                  | Weight      |
|--|-------------|
| <b>Attendance</b>                          | 5%          |
| <b>Cases:</b>                              |             |
| • Case 1 team memo (Westlake Lanes)        | 10%         |
| • Case 2 team presentation (POE)           | 10%         |
| • Case 3 individual memo (Zara)            | 10%         |
| • Case 4 team memo (live case – Lululemon) | 10%         |
| • Case 4 team presentation                 | 10%         |
| <b>Project:</b>                            |             |
| • Project — early research findings        | 5%          |
| • Progress review                          | 5%          |
| • Presentation practice run                | 5%          |
| • Project report                           | 15%         |
| • Project presentation                     | 15%         |
| <b>Total</b>                               | <b>100%</b> |

### Details of Assessments

**Attendance:** After each of the ten classes (starting Sep 16) you will assign yourself a grade as follows:

- 0 = Absent
- 0.5 = Arrived late and/or returned late after the break. Or on time, but not paying attention
- 1.0 = On time, displaying name tent, and actively listening

### Cases

- **Case 1:** This memo is to be completed in your BSI teams.
- **Case 2:** This case involves creating and giving a presentation, working in a new team. Details will be posted on Canvas closer to the day. There is no written memo for case 2. All team members are expected to participate in creating the deliverable and should speak for roughly equal amounts of time during the presentation.
- **Live case (case 3):** This memo and presentation will be completed in your BSI teams. You will receive the company materials and the assignment 2 weeks prior to the event. All team members are expected to participate in creating the deliverable and should be present for roughly equal amounts of time.
- **Case 4:** This memo is to be completed *individually*. **The analyses and write-up must be your own work.**

**Format for case memos (case 1, 3, 4):** Your memos should be 2 pages, plus up to 2 pages of appendices. The live case should include references *after* the appendices (typically 1-2 pages). 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.

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

- **Early Research Findings:** There will be a 15-minute individual in-class writing assignment at the start of Workshop 2. Each team member should be able to answer basic questions about what was discussed at the initial company meeting, what information they gave you and what 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 — under 3 pages
- Intro section – should be written in paragraph form (think of this section as a draft for your report)
- Other sections – use sentences, bullets, tables, or the structure that best conveys the information

**BSI Team Project Cont'd:**

- **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 are 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 team members are expected to present.
- **iPeer Evaluations:** At several points during this course, you will be asked to provide an evaluation of your team members' contributions. These evaluations are required. Failure to provide an iPeer evaluation by the 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 anonymously with your team members.**

**LEARNING MATERIALS**

- **Reading Materials:** The four cases, including materials related to the live case (case 3), and materials provided by the companies for the projects. One of the cases (Westlake Lanes) must be purchased from Ivey Publishing. All information will be posted on Canvas.
- **Other Learning Resources:** Library resources, 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](#). 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:

- **Teamwork:** When working with your team 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 team members will provide feedback at multiple times through iPeer.
- **Team 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 teammates.

*Feedback cont'd*

- **Case debrief class:** After handing in case memos (Case 1 team memo, Case 4 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 4, 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., team work, case debrief) and may provide you with additional perspectives.
- **Presentation feedback:** You will receive feedback on presentations. 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 team 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.

*COVID-19 Policies for Attendance & Academic Concessions:*

If a student feels unwell, they should stay home and send a courtesy email to each impacted instructor and cc their program manager. The student should also submit an [Academic Concession Request & Declaration Form](#).

If a student suspects possible COVID-19 infection, they should use the BC Ministry of Health's [self-assessment tool](#), to help determine whether further assessment or testing for COVID-19 is recommended.

*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*

Devices such as laptops, tablets, and cell phones are not permitted to be used in class unless directed by the instructor for in-class activities. Students who do not follow the school's policy in this regard may be required to leave the room for the remainder of the class, so that they do not distract others. Research shows that students' use of laptops in class has negative implications for the learning environment, including reducing their own grades and the grades of those sitting around them.

*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.

### **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.

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**COURSE SCHEDULE**

*(Subject to change with class consultation)*

| Date & Location                               | Class Topic  | Activities & Readings  | Deliverables  |
|---|--|--|---|
| Week 0,<br>Aug 30 <sup>th</sup>               | <b>CASE METHODOLOGY</b><br><i>(Darren Dahl)</i>  | <ul style="list-style-type: none"> <li>Be prepared to take notes</li> </ul>  |   |
| Tuesday,<br>Sept 9 <sup>th</sup><br>8-12      | <b>CRITICAL THINKING / STRATEGY TOOLKIT</b><br><i>(Sabrina Rai &amp; Steven Minns)</i>                                 | <ul style="list-style-type: none"> <li>In-class activities on business models, critical thinking, and providing feedback to team members</li> </ul>      |   |
| Friday,<br>Sept 16 <sup>th</sup><br>8-12, 1-5 | <b>CASE 1 — WESTLAKE LANES</b><br><i>(Joey Hoegg &amp; Sabrina Rai)</i>  | <ul style="list-style-type: none"> <li><b>Westlake Lanes Case</b> – be prepared to discuss in class</li> </ul>   | <ul style="list-style-type: none"> <li><b>Case 1 due 11pm Sep 15</b></li> <li><i>iPeer due 11pm Sep 18</i></li> </ul>   |
| Friday,<br>Sept 23 <sup>rd</sup><br>8-12      | <b>CASE 2 — JON BLUME</b><br><i>(Tim Silk)</i>   | <ul style="list-style-type: none"> <li><b>POE Case</b> – details to be posted on Canvas</li> </ul>   | <ul style="list-style-type: none"> <li>Everyone arrives at <b>8am</b> - ready to receive the case &amp; work in different teams</li> <li><i>iPeer due 11pm Sept 25</i></li> </ul> |
| Friday,<br>Oct 7 <sup>th</sup><br>8-12, 1-5   | <b>WORKSHOP 1 — INTRO TO PROJECTS</b><br><i>(Mary Chong, DJ Miller, Steven Minns, Tracey Gurton &amp; Sabrina Rai)</i> | <ul style="list-style-type: none"> <li>Introduction to projects, library research skills, communication skills teaser</li> </ul>                         |   |
| Friday,<br>Oct 21 <sup>st</sup><br>8-12       | <b>CASE 3 — PACIFIC OFFICE ELEGANCE</b><br><i>(Tracey Gurton &amp; Colin Dodds)</i>                                    | <ul style="list-style-type: none"> <li><b>Zara Case</b> – be prepared to discuss in class</li> </ul>   | <ul style="list-style-type: none"> <li><b>Case 3 due 11pm Oct 20</b></li> </ul>   |
| Friday,<br>Nov 4 <sup>th</sup><br>8-12, 1-5   | <b>WORKSHOP 2 — PROJECTS</b><br><i>(Mary Chong, DJ Miller, Steven Minns, Tracey Gurton &amp; Sabrina Rai)</i>          | <ul style="list-style-type: none"> <li>Work on projects</li> <li>Communication skills</li> <li>Feedback - Lululemon</li> <li>Librarian visits</li> </ul> | <ul style="list-style-type: none"> <li>Early Research Findings to be completed individually inclass</li> </ul>  |
| Friday,<br>Nov 18 <sup>th</sup><br>8-2        | <b>CASE 4 (LIVE CASE) — LULULEMON</b>  | <ul style="list-style-type: none"> <li>Details to be posted on Canvas</li> </ul>   | <ul style="list-style-type: none"> <li>Memo due 11pm Nov 16</li> <li>Slides due 11pm Nov 17</li> <li><i>iPeer optional 11pm Nov 20</i></li> </ul>                                 |
| Friday,<br>Nov 25 <sup>th</sup><br>8-12, 1-5  | <b>WORKSHOP 3 — PROJECTS</b><br><i>(Mary Chong, DJ Miller, Steven Minns, Tracey Gurton &amp; Sabrina Rai)</i>          | <ul style="list-style-type: none"> <li>Work on projects. Librarian visits</li> <li>Team check-in based on iPeer feedback</li> </ul>                      | <ul style="list-style-type: none"> <li>Progress Review due 11pm Nov 21</li> </ul>   |
| Friday,<br>Dec 2 <sup>nd</sup><br>8-12, 1-5   | <b>WORKSHOP 4 — PROJECTS</b><br><i>(Mary Chong, DJ Miller, Steven Minns, Tracey Gurton &amp; Sabrina Rai)</i>          | <ul style="list-style-type: none"> <li>Presentation practice</li> <li>Work on projects</li> </ul>  |   |
| Monday,<br>Dec 12 <sup>th</sup><br>8-2        | <b>FINAL PROJECT PRESENTATIONS</b><br><i>(Mary Chong, DJ Miller, Steven Minns &amp; Sabrina Rai)</i>                   | <ul style="list-style-type: none"> <li>Details to be posted on Canvas</li> </ul>   | <ul style="list-style-type: none"> <li>Report due 11pm Dec 10</li> <li>Slides due 11pm Dec 11</li> <li><i>iPeer due 11pm Dec 16</i></li> </ul>                                    |