HS 252b
Draft Syllabus – subject to change

Brandeis University
The Heller School for Social Policy and Management

HS 252b: STRATEGIC MANAGEMENT
Spring 2016 – V1.9

Instructor: Joel Cutcher-Gershenfeld
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Office: room 202

Class Time: Thursdays 6:00-8:50 PM
Location: Schneider & Family Bldg G4
Office hours: Thursdays 1:00-3:00 PM

Teaching Assistant: Dan McConvey
Office hours: Tuesdays 12:00-2:00 PM

Program Administrator: Norma DeMattos
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Course Aim:

Increase your capability to serve as a strategic, humanistic systems thinker, better able to lead and manage mission-driven service operations.

Course Description:

This course explores the mission-based manager’s need to think strategically and act effectively in a dynamic environment. You will develop skills and methods for critically analyzing the components of markets, organizational structure, strategic plans, and strategic actions. The course will help you integrate and apply material learned in the various functional subjects you have studied.

The course material is highly varied and examines many aspects of competition, technology, and the environmental and ethical considerations in decision-making. Case material will draw on both for-profit and non-profit examples and examine how leaders and managers in both can use strategic management as a force for both fostering positive social change and creating financially successful enterprises. Excellent analyses, both qualitative and quantitative, will be expected. You will learn that an organization’s strategy and its environment are linked in a system in which managers must constantly formulate, implement, execute and evaluate strategy.

Because there is not just one correct solution to any strategy situation, and a key skill for both business and nonprofit managers is the ability to persuade others and achieve sufficient stakeholder alignment to deliver results. A secondary goal of this course is for you to gain experience in formulating in-depth analyses and cogent, substantive arguments. You will be expected to present this material during case discussions. Extensive case preparation is required. Other aspects of this course include:

Course Materials:

• Cases: A package of cases and articles will be available for purchase through Harvard Business School Publishing at an up to 50% discount at: https://cb.hbsp.harvard.edu/cbmp/access/44714114
• Electronic files and other articles will be posted on the Latte course platform
• Supplementary readings – if you develop a particular interest in an area or concept in the course and would like supplementary reading suggestions, please let me know
Course Requirements

Grading will be according to the following formula (with due dates):

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Points</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classroom preparation and participation</td>
<td>40</td>
<td>All but the first and last classes</td>
</tr>
<tr>
<td>Mid-term paper</td>
<td>25</td>
<td>Paper due Feb. 25th; Slides due Mar. 3rd</td>
</tr>
<tr>
<td>Team project</td>
<td>35</td>
<td>Paper and slides due Apr. 14th</td>
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</tbody>
</table>

**Classroom participation:** Be prepared to attend each class including class 1 and to participate actively in the discussion. Presenting your analysis will range from a formal presentation of your material to simply using it as background for discussion. Because much of the learning in the course comes from case preparation and from lively discussion, the classes will be more beneficial with active participation from everyone.

You will constantly be expected to present well thought-out analyses and arguments. Comments and debate that move the group discussion forward or that offer fresh insights or thoughtfully unique approaches to the material are the most valuable. Comments that re-cast some aspect of the case under analysis or that call attention to overlooked but relevant details are also valued. Participation that merely re-states the facts of the case, while sometimes helpful at the beginning of discussion is the least valuable. If you are having trouble with classroom participation, please make an appointment with me.

Attendance is critical both for classroom discussion and your learning. You cannot pass this course if you miss more than one class. If you must miss a class (or will be late), please advise me in advance by email. If you receive an excused absence, I will provide make-up work.

Please also note that, to ensure that all students are fully engaged in class discussions, I request that laptops not be used during class except when required for in-class assignments. Please also plan to turn off all cell phones.

**Mid-term paper:** This is an individual paper of ten pages or less involving a critique of business plans using course frameworks as well as knowledge from your other courses. You will be given a choice of different actual business plans to critique. This represents 25% of the course grade and your analysis will be assessed as follows:

- Concise (1 page) executive summary and compelling writing throughout: 20%
- Analysis using course concepts (with citations to sources where appropriate): 60%
- Clear action implications for relevant stakeholders: 15%
- Innovation and creativity: 5%

  **Total:** 100% or 25 points

You will also be asked to prepare a short powerpoint presentation with no more than three slides (not counting the cover slide) covering your key findings and several randomly selected critiques will be presented in class.

**Final project:** This is a team project. You will be asked to form teams of 3 – 5 students and develop a strategic analysis and recommendations for an organization of your choice using class frameworks. Each team will be required to submit a paper and prepare a powerpoint presentation with no more
than seven slides and each team will present their strategy in class (with each person participating in the presentation). This represents 35 points toward the course grade and you will be assessed as follows:

- Concise executive summary (1 page) and compelling writing throughout: 15%
- Analysis using course concepts (with citations to sources where appropriate): 50%
- Clear action implications for relevant stakeholders: 20%
- Class presentation: 10%
- Innovation and creativity: 5%

Total: 100% or 35 points

Additional guidance will be posted on the course platform.

**Provisions for Feedback:** You will receive mid-term feedback on your class participation and written feedback on the midterm and final projects. I am happy to provide informal feedback at any time – please make an appointment.

**Academic Integrity:** Academic integrity is central to the mission of educational excellence at Brandeis University. Each student is expected to turn in work completed independently, except when assignments specifically authorize collaborative effort. It is not acceptable to use the words or ideas of another person - be it a world-class philosopher or your classmate - without proper acknowledgement of that source. This means that you must use footnotes or other citations and quotation marks to indicate the sources of any phrases, sentences, paragraphs or ideas found in published volumes, on the internet, or created by another student. Violations of university policies on academic integrity, described in Section 3 of Rights and Responsibilities, may result in failure in the course or on the assignment, and could end in suspension from the University. If you are in doubt about the instructions for any assignment in this course, you must ask for clarification.

**Notice:** If you have a documented disability on record at Brandeis University and require accommodations, please bring it to my attention prior to the second meeting of the class. If you have any questions about this process, contact Mary Brooks, disabilities coordinator for the Heller School at extension 62816, or at maryeliz@brandeis.edu
Course Overview

Part I. Introduction

Session 1  January 14 – Introduction: Mission-based strategic management

Part II. Competitive Context

Session 2  January 21 – Competition as a strategic force
Session 3  January 28 – Evaluating the external environment / Addressing demand

Part III. Organizational Structure

Session 4  February 4 – Business plans
Session 5  February 11 – Collaborations, alliances and mergers

February 18 – No Class (Mid-Term Recess)

Session 6  February 25 – Organizational structure, alignment, and functional tactics

Part IV. Organizational Processes

Session 7  March 3 – Leadership and mission
Session 8  March 10 – Governance / Business plan analysis presentations
Session 9  March 17 – Organizational change / Business plan analysis presentations
Session 10  March 24 – Labor force and talent management

Part V. Organizational Innovation

Session 11  March 31 – Brand management and project management
Session 12  April 7 – Innovation

Part VI. Concluding Class Presentations

Session 13  April 14 – Student team presentations and concluding class

April 21 – No class (Friday Schedule on Thursday)
Course Outline

Part I. Introduction

Session 1  January 14 – Introduction: Mission-based strategic management
How to analyze a case
Managing growth

Overview: This session establishes the social contract between the professor and the class. It also introduces key tools for strategic thinking and addresses core questions on managing growth.

Read:

What is Strategy (HBS 96608) included in course pack

Going to Scale: The Challenge of Replicating Social Programs

Can You Say What Your Strategy Is? (HBS R0804E) included in course pack

Be ready: To have a team discussion using the five forces and “Can you say what your strategy is” to analyze the Heller School

The following sites may also be helpful as general background or research tools throughout the course:

http://www.independentsector.com
http://www.guidestar.org
http://www.nptimes.com
http://nccs.urban.org/
http://www.nonprofits.org/

Part II. Competitive Context

Session 2  January 21 – Competition as a strategic force

Overview: The five competitive forces that shape strategy are examined in the for-profit and not-for-profit contexts. Cases provide opportunities to apply strategic management principles in the context of competition and potential growth.

Read:

The Five Competitive Forces That Shape Strategy (HBS R0801E) included in course pack

Competitive Battles: How to Size up Competitors (HBS1744) included in course pack

Prepare: Endeavor – Determining a Growth Strategy (HBS 9-803-126) included in course pack
Session 3  January 28 – Evaluating the external environment / Addressing demand

Overview: This session provides insights in ways to manage or enact the external environment, with a case that includes challenges and constraints on revenue (but no limit on the opportunity for creativity). The question as to whether a not-for-profit is distinct than a for-profit in this context will be considered.

Read:

Three Corners – Why You Can’t be More ‘Like a Business’


Prepare: Youth Villages (HBS 9-309-007) included in course pack
See preparation questions on course platform

SF Symphony (Stanford GSB) in course pack
See preparation questions on course platform

Note: Please also download the SF Symphony spreadsheets (on course platform)
and bring a copy pre-loaded on a laptop to class. We will use this for team analysis.
If you don’t have a laptop, you can team with someone who does.

Part III. Organizational Structure

Session 4  February 4 – Business plans

Overview: This session harnesses strategic management principles in the development of business plans for new ventures. The specific elements of a business plan will be reviewed and skills needed in developing a business plan will be advanced through in-class exercises. Examples of new business planning in the for-profit and not-for-profit context will be examined.

Read:


Writing a Business Plan: The Basics (HBS 5344BC) included in course pack. Read pp. 1-23, optionally read pp. 24-43 for finance review

Note: See course platform for individual business plan critique assignment due 2/25. Sample business plans will be posted under session 5
Session 5  

February 11 – Collaborations, alliances and mergers

Overview: This session will examine the many forms of multi-organization and multi-stakeholder collaboration, including public-private partnerships, joint ventures, strategic alliances, and multi-stakeholder consortia or initiatives. The dynamics of cooperation and competition will be addressed. A simulation exercise complements the material.

Read:


Project on Stakeholder Alignment in Complex Systems (2013) "Open Data: Crediting a Culture of Cooperation" (29 November) Science, Letters


Mergers and Consolidations:  http://www.npccny.org/info/goi4.htm

Multi-stakeholder Strategic Bargaining Game Simulation

February 18 – No Class (Mid-Term Recess)

Session 6  

February 25 – Organizational structure, alignment, and functional tactics

Overview: This session integrates classic readings with two cases that surface issues of structure and alignment. Strategic principles are paired with the challenges of execution.

Read:

Organizational Alignment: The 7-S Model (HBS9-497-045) in course pack

Creating Value from Organizational Alignment (HBS B0511A) included in course pack

Turning Great Strategy into Great Performance (HBR R0507E) included in case pack

The Secrets to Successful Strategy Execution (HBR R0806C) included in case pack
Part IV. Organizational Processes

Session 7  March 3 – Leadership and mission

Overview: Mission-driven organizations depend on mission-driven leadership (at all levels), which is the focus of this session. The challenges of leading change will be examined through multiple lenses.

Read:

Working on Nonprofit Boards: Don't Assume the Shoe Fits (HBS 99608 PDF-ENG) included in course pack


Leading Change – Why Transformational Efforts Fail (HBS R0701) in course pack

Prepare: Trustees of Reservation (HBS 9-305-078) included in course pack

Session 8  March 10 – Governance / Business plan analysis presentations

Overview: Governance in the for-profit and not-for-profit sectors is changing in crucial ways. This session brings you to the “C-suite” and above to better understand structure, process, and other dimensions. There will also be time for some of the business plan analysis presentations.

Read:


Additional hand-outs on health care CEO search
Business Plan Analysis Presentations

Session 9  March 17 – Organizational change / Business plan analysis presentations

Overview: We will go deeper into the dynamics of change in organizations – for-profit and not-for-profit. Multiple change models will be covered and your change-blind sides will be considered. The balance of the business plan presentations will also be completed.

Read:

Change Through Persuasion (HBR R502F)

Heath, Chip and Dan Heath (2010) Switch: How to change things when change is hard” New York: Broadway Books, Chapters 1, 2, 3, 4.


Business Plan Analysis Presentations

Session 10  March 24 – Labor force and talent management

Overview: New thinking about the human side of enterprise will be presented. Two cases will interweave with the readings and key principles will be debated. There is no leading organization – for-profit or not-for-profit – that doesn’t struggle with the strategic challenge of getting the talent equation right.

Read:

Rule 3: Engage Today's Talent (HBS 3926BC) included in course pack


Tom Coens and Mary Jenkins (2002) Abolishing Performance Appraisals: Why They Backfire and What to Do Instead, Forward (by Peter Block), Chapters 1, 2, and 3.


**Prepare:** Cirque du Soleil (HBS 9-403-006) included in course pack

Performance Pay at MGOA - A (HBS 9-904-028) included in course pack. and Performance Pay at MGOA – B (HBS 9-060-05) included in course pack.

**Part V. Organizational Innovation**

**Session 11 March 31 – Brand management and project management**

**Overview:** Both for-profit and not-for-profit organizations mismanage their brands more often than they skillfully manage this defining strategic resource. While brand management is unquestionably central to strategic management, project management is too often seen as a set of tactical skills. We will examine the strategic role of project management, including cases of projects in which the future of the enterprise is at stake.

**Read:**

Mining Gold in Nonprofit Brands (HBS F0404D) included in course pack


What Are Business Models and How Are They Built? (HBS 9-610-019) Included in course pack

**Prepare:** The AMA-Sunbeam Deal A (HBS 9-801-326) in course pack.

**Session 12 April 7 – Innovation**

**Overview:** Innovation is not limited to the lone inventor – serial innovators working within organizations are some of the most remarkable people you have never heard of. We will unpack the innovation process and consider how innovation principles can be advanced in any organization. A simulation exercise will provide you the chance to be an innovative designer.

**Read:**

Abbie Griffin, Raymond Price, and Bruce Vojak (2102) Serial Innovators: How Individuals Create and Deliver Breakthrough Innovations in Mature Firms. Palo Alto: Stanford Business Books – Chapters 1, 2, 3, 4

**Prepare:** Zipcar: Refining the Business Model (HBS 9-803-096) in course pack

**Simulation:** SoftTouch, Inc.
Additional recommended readings:


Part VI. Concluding Class Presentations

Session 13  April 14 – Student team presentations and concluding session

Slides due at noon on April 13th
Final project papers due at noon on April 14th

April 21 – No Class (Friday Schedule on Thursday)
Emergency Response Recommendations

In any organization, safety is the number one consideration. The Department of Homeland Security recommends the following three responses to any emergency on campus: **RUN > HIDE > FIGHT**

**ONLY FOLLOW THESE ACTIONS IF SAFE TO DO SO.** When in doubt, follow your instincts—you are your own best advocate!

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**RUN**

Action taken to leave an area for personal safety.

- Take the time now to learn the different ways to leave the building **BEFORE** there is an emergency.
- Evacuations are mandatory for fire alarms and when directed by authorities. **No exceptions!**
- Evacuate immediately. Pull manual fire alarm to prompt a response for others to evacuate.
- Take critical personal items only (keys, purse, and outerwear) and close doors behind you.
- Assist those who need help, but carefully consider whether you may put yourself at risk.
- Look for **EXIT** signs indicating potential egress/escape routes.
- If you are not able to evacuate, go to an Area of Rescue Assistance.
- Evacuate to Evacuation Assembly Area and remain until additional instructions are given.
- Alert authorities to those who may need assistance.
- Do not re-enter building until informed by emergency response personnel that it is safe to return.

**ACTIVE THREAT:**
- If it is safe to do so run out of the building. Get as far away as possible.

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**HIDE**

Action taken to seek immediate shelter indoors when emergency conditions do not warrant or allow evacuation, such as for severe weather.

- Take the time now to learn the different ways to seek shelter within your building **BEFORE** there is an emergency.
- If you are outside, proceed to the nearest protective building.
- If sheltering-in-place due to severe weather, proceed to the identified Storm Refuge Area or to the lowest, most interior area of the building away from windows or hazardous equipment or materials.

**ACTIVE THREAT:**
- Lock or barricade your area.
- Get to a place where the threat cannot see you.
- Place cell phones on **silent**.
- Do not make any noise.
- Do not come out until you are advised it is safe.

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**FIGHT**

Action taken as a last resort to increase your odds for survival.

**ACTIVE THREAT:** If you cannot run away safely or cannot hide, **be prepared to fight with anything available to increase your odds for survival.**