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**INTEGRATED BUSINESS  
POLICY & STRATEGY**  
**SUMMER III 2009**  
**KENT MAIN CAMPUS**



**MTWR**  
**NOON - 1:55 pm**  
**BSA 213**

**Professor Jim Williams**  
**330 493-7592**

**[jwilli55@kent.edu](mailto:jwilli55@kent.edu)**  
**[jwilliams1993@neo.rr.com](mailto:jwilliams1993@neo.rr.com)**

# INTEGRATED BUSINESS POLICY & STRATEGY

*Business strategy is less a function of grandiose predictions than it is a result of being able to respond rapidly to real changes as they occur. That's why strategy has to be dynamic and anticipatory." - Jack Welch*

## “UP PERISCOPE”

### AN INSIDE VIEW

"If you tell me, I will listen. If you show me, I will see. But if you let me experience, I will learn." The depth of this simple saying from a Chinese philosopher in the 5<sup>th</sup> century captures perfectly the essence of the teaching process in all my classes regardless of subject. My students / associates are my customers and if the customer is not satisfied and fulfilled after the experience, that customer will not return and even worse, will share their negative experience with dozens of others immediately. The customers / students are provided absolute clarity in the syllabus and in our initial joining of my expectations of them. As importantly, I seek their expectations of me so at the junction of the two crossroads, the real work can begin. There are ten core principles that formulate the mile markers of the journey with my approach:

1. The best way to learn is to teach
2. You will never learn to lead until you learn to serve
3. There are no losers on a winning team but there are no winners on a losing team
4. Accountability foundation: If you can measure it, you can manage it
5. Leaders LEAD
6. Feedback is the breakfast of champions
7. Nothing happens in isolation so the dots do and must connect
8. Communications 360!
9. No Surprises & Absolute transparency
10. If you are working on anything other than Jim, Inc performance, you are working on the wrong things

The core to the learning journey is with the establishment of a business enterprise we call Jim, Inc. It is a team-based organization with not more than five students on each team. A set of team leaders is appointed by me before I even meet them. From the team leaders, a Chief Operating Officer, (COO) is appointed that leads a team, but also heads the class team leaders and reports directly to me as CEO. All matters of the class during the entire semester will channel to and through the COO. A performance appraisal system will be utilized as the mechanism to ensure all class members are contributing members of the organization. A form will be provided to the team leaders and they will be instructed to conduct a

**INTEGRATED BUSINESS POLICY / STRATEGY SUMMER III 2009**

2

**PROFESSOR JIM WILLIAMS**

**KENT MAIN CAMPUS BSA 213 MTWR NOON – 1:55 PM**

**11:08 AM 7/22/2009**

formal performance appraisal with their teams requiring each team member to initial the form after the interview. The completed performance appraisals are collected by the COO and submitted to me for review. This occurs every two weeks throughout the semester.

All work of the semester is team-based which means all examinations, presentations, research papers, essays will be developed and presented by and with the team.. As the CEO, there are team leader meetings at least three times each semester and if I sense issues arising with a team or the class, I will devote special time and focus on that team and / or the individual. The team leaders are allocated power of influence via the performance appraisal system as well as providing having discretion of a point allocation for each of the semester work components. That allocation is based on the team member involvement and contribution to the specific block of work. If 500 points are available and the team member does not do his / her part, the team member is given a zero for that block. That is true for all of the blocks of work. At the end of the semester 1,000 points is allocated for the team leader to assess the overall involvement and contribution for each team member thus having significant impact on their final grade.

For this system to work, the CEO must establish clarity of authority and responsibility balance to / for the team leaders. The team leader is the key to the whole process. That person is well placed to surface issues within the team early allowing time to either solve the issues or bring it up the chain through the COO and then to me as CEO. So is this transferable? It most certainly is for it is the way business operates. The class is our business for it is not a traditional class experience. The CEO and the Team Leaders will form the Board of Directors of Jim, Inc. Every phase and component of the class will be a collective effort of the Jim, Inc. Board from discipline to the work to attendance to delivery to everything. As the CEO, my primary role is to cast a vision that stretches the capability of the class but also does whatever is necessary to ensure the whole class strives to meet the challenge of the course experience. This is very serious of business and the opportunity to function in an environment that models the world of normal business will prove interesting and invaluable for those graduating and learning to live in a world driven by accountability.

We celebrate successes and we will correct offenders that impede or impugn the class's cultural evolution with the student team leader being the point on the spear. My role as professor / CEO is to be the giant shadow of authority that is always there, but also as the cheerleader, stand-up comic, executioner, or whatever role needs to be played to ensure the teams and thus the class is a success. The work load is heavy and complex, but time tested by thousands of students for it is a right, unique, and very positive learning process. It is probably not feasible to execute unless the professor has the heart, the energy, the transparency, and the desire to devote to such a process and to each student. However, once launched and the culture evolves, the workload on the professor is transferred to the teams which is where it should be as a CEO watching his business grow and develop.

The learning is enriched by guest speakers that address specific topics within the curriculum. The semester is sprinkled with external professionals in their field as speakers that also become part of the students' network when that class contribution is completed. The speakers, all business leaders themselves, then become part of a fact-finding interview process at the business location when the team sets up a formal interview visit time in business attire. The interview educates the team on the mission, vision, strategies, financials, communications, and marketing systems the business uses and many other business-critical elements of information. The team then, along with the business leader during class, makes a formal presentation to the class on the elements listed and lessons learned from the course and observed first hand at the business location. The crux of the process is to package all the learning of the semester into a business plan to market an assigned good / service to a hedge fund investor group. This group is comprised of a team of former students of mine that make an initial appearance at the first class. They then return on the last class when the teams presented their business plan to the head fund group for decision to invest or not and why to the teams.

The examinations are all ten question discussion-type that seeks to ascertain that the student / team "understands" the concepts via the questions by using in-class examples to illustrate their answers /

understanding. As the CEO / Professor, I set myself up on day one as the example of the Leader and thus strive with every interaction verbal, email, presentation, etc, to display Leadership characteristics beginning with RESPECT that the students can emulate in their business and personal lives going forward.

In summary, it is impossible to begin to synthesize into three to four double spaced pages the richness of the calculus of a unique business education approach. My students love it as is evidenced by course evaluations and feedback. The approach is not easy by any stretch of the imagination, but students love to be stretched via clear vision, immovable boundaries of behavior, and respect with them and toward them. A core boundary, for example, is a zero-tolerance on absenteeism. Taking attendance in a very public manner sends powerful signals on the importance but also allows for personal interface on appearance, humor, sense of problem issues, etc, within the class. The class setting is a clear view of leadership in action that provides an umbrella for effective learning through example. Modeling a business environment as a learning laboratory is, well, the only way I will teach for the rest of my teaching life for it is right, it is real and it works. Much like Wolf Blitzer's Situation Room approach, a myriad of global events is mixed into the learning environment to keep the learning fresh, pertinent and viable. It still amazes me when I see the students become "hungry" to understand what is happening in their world; that world in which they are going to earn a living, raise a family and prosper or not in the years ahead. Students to care and do appreciate the extra time, effort and energy afford them individually and collectively by the professor. Why? They are worth it!

Two formulae comprise the entire process:

- Behavior = f(Individual and the Environment)
- Productivity = f(Individual, the Group, and the Environment)

The professor must become knowledgeable at a personal level of each student for the Behavior formula to work. The Productivity formula is impossible unless the Behavior formula becomes the state of normalcy within the culture you are developing. There is NO CHANGE until there is a measureable change in behavior and that is the definition of culture change! The professor / CEO is the manager of the Environment of the class room or the workplace in Jim, Inc! The architecture for the whole experience is Ken Blanchard's Situational Leadership Model for at the core of the SLM rests the responsibility for the leader, the professor, to invest in each student to begin to know and understand their level of competency and motivation. Collectively, that determines the leadership style that is used in the learning adventure.

Each team will have specific work to accomplish and at the outset let it be stated that the work **WILL GET DONE**. Let me further iterate that the teams working alongside each other as well as concentrically are by definition, Synergy. We all Win or we all Lose ... trust me on that principle statement. If during the semester a team or a class sees a team or a team leader falling behind or struggling, I expect the other team leaders and teams to energize to support and level out the field for all the teams for it is all the teams that must work synchronously for Jim, Inc to succeed.

Two guiding principles will be at the core of all we will do which are Continuous Improvement and Customer Service. No business, organization, family, etc, will survive in long term unless both of these principles are in-place at all times. This course now even before it begins, all the time investment during the journey and the years ahead after the experience will be still founded on these core principles. They have stood the test of time and experience!

All of this takes time, effort and energy but, and most importantly, it works so that makes it all worthwhile! See, the students are the "fixers" of tomorrow to those of us that have experienced, done and created the reality of today are mandated to provide, give all we have to enlighten the "fixers" of tomorrow in any way and every way we can find. That, to me, is the true definition of Education for it is not about the professor but all about the student. The burden of the work, which will get done, rests with the student but the organization, the teams, the vision and the structure as well as the professor all come to the confluence of effective learning.

# COURSE OBJECTIVES

Upon completion of the course, the student should be able to:

- **Increase** awareness of the synergies in attaining business success
- **Define** leadership and its role in an effective business
- **Benchmark** an assigned business to assess the core elements of the business
- **Overview** of the value of planning and strategy to business success
- **Internalize** the basic steps of strategic management
- **Identify** key “drivers” and performance measures within a business
- **Develop** a desire for students to be business leaders
- **Create / Manage** the course work via a business plan and a team
- **Learn** the power of Situation Leadership to effectiveness
- **Describe** Goal setting as a SMART model
- **Understand** the new business investment reality of a private equity firm
- **Describe** the power of Mission, Vision, & Strategy
- **Construct** a strategic business plan for a private investor group “sell” presentation

**If you don't know where  
you are going, it is there  
you will end up ...!**

## COURSE DESCRIPTION

This journey we are embarking on will be focused in avenues of / to / by / what is this thing called “Strategic Management.” This will be an adventure into an environment of delivery pressure, heavy workload, time consumption and commitment to deliver a strategic plan to entice a private equity leadership group to invest in your product that each team will be assigned. This course is “live fire” meaning it is conducted in every way as life in the commercial fast lane so that it feels the real world with all its good and not so good that goes with that. It is about learning, feeling, sensing, and understanding the vital nature of planning at a strategic, long view, wide footprint perspective.

Strategic and Tactical; two very different yet very connected elements of a business enterprise that will be at the forefront of our time together in seeking to bring the light of clarity to their importance. As we begin the journey in 2009, the currents of traditional philosophies are more confusing with each passing day. I would never have imagined that there would be scholarly debate about transcending from a Free Market economic system toward a Big Government Socialism economic system. As I have prepared my mind for our time together and realizing the core purpose of this course to grasp the importance of managing strategically, it has become blatantly apparent that we should build this journey around the two divergent poles of a Free Market versus a Centrally Planned Economy. So Adam Smith and Karl Marx become the paternal source of the DNA over three hundred years ago that has shifted us, grown us, enriched us, provided immeasurable wealth for us, created a cavern of Big Government and Entitlement programming on a scale Roosevelt could not have imagined. So it is the best of times and the worst of times in which

**INTEGRATED BUSINESS POLICY / STRATEGY SUMMER III 2009**

5

**PROFESSOR JIM WILLIAMS**

**KENT MAIN CAMPUS BSA 213 MTWR NOON – 1:55 PM**

**11:08 AM 7/22/2009**

we live it seems! Therefore, we have a rich learning laboratory opportunity from which to learn from a principles dimension.

As the name of the Course projects, we must for we should truly drill in the furrows of this thing called BUSINESS from the spinal column of Policy and the skeletal system of Strategy as you move to a point in your life to decide a direction for that career. Business in a Free Market is remarkably different than a business in a CPE, Centrally Planned Economy. Mind you, there will be those that might wish to turn this position for this course into a political or ideological forum to attack but alas, that will not happen. It is my intention to put the facts before you and you to the rest of us in a way that clears the way for you, the individual, to decide what is best for you, for society and for our world which is your world you are building for your children and grandchildren. Strategic management is vital for envisioning a business threshold carries with it energy to push an organization even through the tough times as no doubt we can all attest to witnessing daily.

It is pertinent and important that we launch our journey from an economic benchmark and then reflect against that benchmark as the learning components flow into reality. GROSS DOMESTIC product is defined as the value of all goods and all services produced in a given economy over a given period of time. The current "value" of the USA GDP is \$14.5 trillion; the largest and most technologically driven GDP of any other country in the world. However, even though this is not an economics course, it is a BUSINESS course so we will examine the formula for GDP and then probe each piece.

The formula for GDP, simply, is  $GDP = C + I + G + (X - M)$  which means that if you add all consumer spending, C, to all Investment and then add G, government spending, and then add the value of exports and then reducing by the value of Imports, you have GDP. When you realize that the greatest contributor to GDP is consumer spending, dwarfing the "I" and the "G," then it becomes a business policy and strategy focal point for leaders. The global economic slowdown is causing consumer spending and investment dollars to slow or dry up while more "inefficient" government spending is escalating and thus unbalancing the formula. So you see, it is about Policy and it is about Strategy for it is all about Leadership of business; the linking point for our journey.

## **CAPSTONE EXPERIENCE**

As this is a Capstone course, there should be, then, a Capstone experience within the course that facilitates utilization of all the elements we will examine and that you have experienced during your academic journey. Benchmarking good businesses practices is vital to moving a new business in a competitive direction. Therefore, each team will be assigned an actual business in the Kent regional area. The team will formulate a professional management benchmarking process we will call a Study Mission that will begin with an on-site interview with the business leadership armed with a set of questions to be approved by Professor Williams prior to a visit to the assigned location. Prior to the visit that will be planned and prepared by the team; the team will present the intended purpose of the visit and expected outcomes in a presentation to the class. All arrangements for the location study mission will be done by the team. The Study Mission teams are to examine and assess the strategic strengths and weaknesses from their business visit as well as tactical strengths and weaknesses.

While on-site, the team will be expected to be the "poster children" of professionalism in appearance, communications, and coordination of all details of the site visit. The primary purpose of the site visit is to examine the spinal column and skeletal system of the assigned business to understand the mission, vision, organizational structure, cost-down strategies, value-enhancement strategies, financials and communication systems. The information gained from the site visit will be developed into a formal team presentation to the class. From the findings, the teams will then initiate developing a business plan that will be presented to a hedge fund investor group to entice the finance a new product or service startup to include making, selling, marketing and financial of the new venture. The assignments are:

- ALFA TEAM                    MacWhop ½ pounder ‘burger w/ calories for \$1.50 per sandwich
- BRAVO TEAM                Nuclear powered automobile Iced ketchup fountain drink
- CHARLIE TEAM             Musical textbook for second grade school age children
- DELTA TEAM                Vietnamese restaurant featuring roasted dog to go
- ECHO TEAM                 Wind powered bicycle

Integrated Business Policy & Strategy, the course, is developed on the premise that students are challenged to think critically about the material at hand and their own attitudes about the learning. Refining the tools you will be developing and employing throughout your careers is a core learning process of the adventure. The prevailing theme of the course is [leadership and change](#) and the demands it places on people and organizations to grow and adjust while maintaining well being in an environment of constant and rapid change. The fundamental basis of the Course is that there is no Business until there is a successful negotiation of price for a good or service transaction. The syllabus concept is tethered to that transaction as a commercial venture that is dissected into its component elements which are then threshed out in a host of experiences during the semester.

# STRATEGIC LEADERSHIP FORWARD



## THE ROLE OF CAVALRY ... STRATEGY IN OPERATION

From the U.S. Army's Field Manual for CAVALRY, FM 17-95 states that: "The fundamental purpose of cavalry is to perform reconnaissance and to provide security in close operations..."

- Cavalry clarifies the fog of battle
- Cavalry is an economy of force
- Cavalry conserves combat power
- Cavalry is ideal for offensive / defensive missions as an economy of force
- Cavalry is a catalyst that transforms the concepts into capability
- Cavalry is maneuver which is the essence of fight
- Cavalry is the "eyes and ears" of the commander
- Cavalry provides situational awareness

CAVALRY depicts what I view as a perfect description and thus definition of Leadership as it applies to the operational element of strategy. Read it again! Key bullets of Cavalry are likewise true for Leaders of organizations. Therefore, strategic management must have eyes to see, ears to hear, feet to maneuver, smell to sense and touch to assess the composite of information required to make right and timely decisions. Casting a longer view and a wider footprint is the role of Cavalry in a tactical environment meaning, therefore, for tactics to fulfill the mission, eyes and ears must be provided for the decision makers or the commanders. Strategic leadership is focused on exactly the same criteria; a longer view and a wider footprint.

In our academic journey this semester, the team leaders and I, as the CEO, comprise the strategic dimension of our course objectives to be accomplished while the teams and their members are the tactical foot soldiers and artillerymen for the battle before us. The military metaphor might be perhaps distasteful but it provides a perfect illustration of strategic leadership meshing into a master plan of tactical implementation for success or failure. Flexibility is the verb that purposes energy forward as the forces of planning, organizing, directing, coordinating and controlling are, the principles of management that are brought to bear on the enemy / the competition. See, it really is a war zone and winners win but losers, well, lose big time!

## REQUIRED BOOK

- Strategic Management by Hitt, Ireland, Hoskisson 8<sup>th</sup> edition ISBN 13: 978 0 324 65559 9
- The End of Detroit by Micheline Maynard ISBN-10: 0385507690
- The Goal: A Process of Ongoing Improvement by Eliyahu M. Goldratt ISBN 9780884271789

## GRADING SCALE

Grade	Percentage
A	100-95
A-	94-90
B+	89-86
B	85-83
B-	82-80
C+	79-76
C	75-73
C-	72-70
D+	69-65
D	64-60
F	59-0

## GRADE POINT BREAKDOWN

- Final Exam 1,500 points
- Enterprise leadership profiling 500 points
- Study Mission 2,000 points
- Global Touch Point 1,000 points
- Research paper / presentation 1,000 points
- Team Business plan presentation 500 points
- Book Project 1,000 points
- Team member involvement / commitment 1,000 points

**TOTAL**

**8,500 points**

# ORGANIZATION

Organizing to get the work done is perhaps the most crucial of all the principles of strategic leadership. Management writers and theorist have expended no little amount of ink in proclaiming the virtues and the horrors of job design, job enlargement and job enrichment. I do not denigrate the importance of any of the work but it is my role as your leader to transform the learning experience of a traditional classroom into a real world boiling pot of issues, needs, deadlines, attitudes, egos, worries, etc, etc; all components of the frailest of the corporate struggle is all about; the People! The work, not the class, but the work will be done in an environment that addresses the characteristics of job modeling to attempt to configure the right configuration of workers to deliver the mandated deliverables of the work experience. In other words, it is not about coming to class and listening to the professor talk for twenty class periods but it is all about each member of the organization's deliver elements, the teams, to get organized, focused, blocks of work assigned and preparation / submission timelines established.

In this environment, it is VITAL that the team leaders get the work organized immediately. This is made more vital with the five week configuration of the course meeting four successive days of the week. The load is presented in the following paragraphs thus the work is identified clearly. The work will be delivered on time, professionally and involve all member of the team on each piece of the work. It is, from day one, about survival in this experience. To get this work done, the class will operate integratedly about part of a company we will call Jim, Inc.

## JIM, INC

Getting work done effectively and efficiently in organizations must be accomplished via an established process. My experience has taught me many things but one absolute is central is in clearly defining the work in a priority mechanism. The work that is being captured in this syllabus, my contract with you, flows through three components in a descending priority order or flow:

1. Goals
2. Roles
3. Interpersonal

### GOALS

There must be clarity and agreement on the measurable benchmarks of a journey, a job, or a career. Goals are statements only unless the criteria of being SPECIFIC, MEASURABLE, ATTAINABLE, REALISTIC and TIME-FRAMED are met. The goals I envision for this course are:

1. You will attain an A grade for course if you choose to do your part
2. Those that have invested in you to be in the course will see a measurable ROI
3. A hunger to want to know more and more will be triggered long after this course
4. You will be better equipped to be effective business leaders

### ROLES

- **CEO** – provides vision, establish boundaries, determine policies, teach
- **COO** – central coordination link with the team leaders on all matters
- **OPERATIONS DIRECTORS** – coordinate / communicate all work of the teams

- **TEAMS** – developers and presenters of the work assignments

### INTERPERSONAL SKILLS

The interpersonal nature of things is vital ONLY when there is clarity of WHY something is important. Establishing GOALS provides the individual and the organization the vital WHAT. The ROLES in conjunction with the WHY and the WHAT provides us with clarity of HOW to get the work accomplished effectively and more efficiently. Void of that is conflict, frustration and exasperation; all cancers to effectiveness.

As your CEO it is MY RESPONSIBILITY to ensure via the syllabus, class conduct and EFFECTIVE COMUNICATION that each student remains completely clear and aligned on the Goals, the Roles AND THEN the Interpersonal Skills required to GET THE WORK DONE!

## PROFIT CENTERS

Team development is not easy. Working in teams is not for the faint of heart or for those that love to bask in their own sun light or spot light. The Team is the core nugget to exemplary performance and we will utilize the Team process at every opportunity during our journey. The result of team-based work, while slower and more frustrating at times, will normally always yield a richer, deeper result that the organization can better utilize in its strive for global competitiveness. That is, after all is said and done, what this whole journey is about; preparing you to become part of an organization within which you can be part of the solution and less a part of the problem. There are four distinct gateways a group will go through on its journey toward being a team:

- Forming
- Storming
- Norming
- Performing

I wish to address a topic that is core to our learning process for it provides the check-and-balance required for an effective organization. That system which is more of an operating principle rests with the Team. The Team and its leader are the core operating unit for any and all issues and works for the class. This is no surprise for it is vital to work within the framework established with the team configuration to ensure alignment, clarity and also, and most importantly, to provide a "trip wire" if issues from within the team, the individuals, should arise. Remember, NO SURPRISES will always win the battle for leaders as you prepare for just that; leadership.

Everything we do will be conducted within the boundaries of our class and that nobody will impinge upon you from outside for I will protect that boundary from external forces. Innate with that, thus, is that if any of you at any time have issues with the class or with me specifically, that redress process goes initially to the team leader for resolve and if not resolved it is then brought to me. If that does not resolve the matter then the student has every right to go outside the framework of our class for resolution. I will even assist that student with ensuring resolution is attained.

You as my customers know I care, you realize I want the best for you and will do all I can to guarantee a world-class learning experience and I believe have lived and reinforced that many times during our time together. I say that to that that I am not on trial here but rather and much importantly the integrity of the process and the system has been impugned and thus violated. The boundaries have been poisoned and that is for me to manage which I am doing in this writing to all my students.

This is an issue of PRINCIPLE so based on that PRINCIPLE, if any of you at any time on any topic have issues with the class, me or even the bath rooms; you initially go to your team leader. If that does not resolve it, you with your team leader bring the matter to me. If that does not resolve I will go with you to whomever you feel is right to gain resolution. THAT IS HOW EFFECTIVE ORGANIZATIONS operate.

**INTEGRATED BUSINESS POLICY / STRATEGY SUMMER III 2009**

10

**PROFESSOR JIM WILLIAMS**

**KENT MAIN CAMPUS BSA 213 MTWR NOON – 1:55 PM**

**11:08 AM 7/22/2009**

You will quickly come to realize that this is a class but it is not conducted as a traditional class. This venture is a business and thus we are conducting ourselves as an effective business would operate. With the size of the class it is my decision, as the CEO, to establish a tiered organizational structure. That structure will be the vehicle through which all the components of our journey will be completed. The class teams

- **Professor Williams**      **CHIEF EXECUTIVE OFFICER**
  
- **Team Leaders**            **OPERATIONS DIRECTORS**
  - ALFA      Cash Lawley                      CHIEF OPERATING OFFICER
  - BRAVO     Marissa Cesarz
  - CHARLIE   Kenis Christie
  - DELTA     Ruby Heer
  - ECHO      James Lonzo

# THE BLOCKS OF WORK

## EXAMINATIONS

There will be **ONE discussion-type examination**. This will be a TEAM project. The teams can use any reference materials they wish to support the answers but all sources will be documented and properly credited. The fundamental of my testing is to see clearly that you **UNDERSTAND** the question thus why I will never use multiple-choice standardized testing materials. The business world does not question things expecting an answer of A, B, C, D, etc. The examination will be emailed to each student one week prior to the due date for the examination turn in. The exam will be turned in hard copy. Effective writing skills are a vital component of our journey so I expect your work to be professionally submitted in spelling, grammar, sentence structure and referencing any sources you might choose to utilize. The examination is to be turned in on the scheduled class indicated in the syllabus. If not turned in the test score will be reduced by ten points for each late class period leading up to the actual submission.

## BUILDING THE BUSINESS PLAN

Business planning is vital to business success. I view this academic journey as a business and thus investment of capital for future returns must yield an ROI or a return on investment. People that yearn to work in a vacuum or carry their own load in a silo will, frankly, struggle this entire semester. A business plan can have many elements but each of the teams will develop its own team business plan to incorporate the following elements:

- Basic assumptions upon which the plan is built
- Team logo / Mission, Vision and Strategies to accomplish the work
- A scorecard that provides transparency on key performance indicators -- KPI
- Attendance accountability policy and metric
- Financial means to manage the inter-team portfolios
- Work completion process / accountability system
- Involvement of ALL team members
- SWOT the process at the beginning and at the end of the journey
- Lessons learned from the journey
- Opportunities for Improvement

The team will develop a **State of the Business** summary that will be presented within the first two weeks of the semester and a final wrap up business plan at the end of the semester covering the components status outlined above for the business plan.

## **TEAM BOOK PROJECTS**

- **THE END OF DETROIT** **ALFA - BRAVO - CHARLIE**
  - General Motors & UAW history & strategic perspectives
  - Ford & UAW history & strategic perspectives
  - The Japanese transformation in the 1980s overview & Toyota
  - Transplants in the South; why and snapshot today
  - The Meltdown / The Taxpayer / The Government & The Car Czar

The book, THE END OF DETROIT, is one of those books that is prophetic as we witness the melting down and pouring of the auto industry as we have known into different molds. The teams will read and research their assigned book. The Book will be presented as a CNN SITUATION ROOM format with an anchor person asking pertinent questions and other team members responding to glean the learning for the class. The questions are to be submitted to the Professor one week prior to the event to ensure the points to be made are found in the body of the questions. The findings from the book will be flavored with certain current articles that bring flavor to the roots outlined in Ms. Maynard's work. The book will be presented in a class presentation as a skit meaning it will be acted out before the class. In the Roadmap you will find the characters through which the book will be presented. Creativity, role play and energy will drive this skit-approach to learning.

- **THE GOAL** **DELTA – ECHO - FOXTROT**
  - The Theory of Constraints / Herby
  - Set the context of the The Goal & SWOT
  - Jonah & factory characters
  - Alex Rogo & Mrs. Rogo
  - Peach and pressure as a motivator / or not

The book, THE GOAL, is one of those rare jewels that in a narrative, easy-to-read form captures the essence, the imperative, the stress and the implication of truly embracing an effective TQM process. This is a required reading but it will be a highlight of the TQM experience I can assure you. We will devote a full class to this discussion and glean from the plant manager's agony why TQM is vital to success in a rapidly transitioning world. We will understand the mystery man / guru, the plant manager and his woes at work and at home and see how the two intertwine under pressure. There are three fundamental questions facing Rogo: **What to change? What to change to? How to cause the change?** **Storyboarding** is a key to breaking the work into systematic "pieces" that facilitates tapping the energy of the team to focus on the core issues.

The teams will read and research their assigned book. The Book will be presented as a CNN SITUATION ROOM format with an anchor person asking pertinent questions and other team members responding to glean the learning for the class. The findings from the book will be flavored with certain current articles that bring flavor to the roots outlined in the work. The book will be presented in a class presentation as a skit meaning it will be acted out before the class. In the Roadmap you will find the characters through which the book will be presented. Creativity, role play and energy will drive this skit-approach to learning.

# STRATEGIC LEADERSHIP PROFILING

Each of the teams will be assigned a significant enterprise to track and report on throughout the semester. The information will be presented via PowerPoint to the class with each team member required to present part of the information. Seeking the strategic nature and sets of issues the enterprise currently faces with the caveat shown below should frame the knowledge development. The team will develop a comprehensive body of knowledge about their assigned topic. The team will be called upon in an ad hoc manner as well as on a scheduled class period to update the class on the following elements of their topic. The team assignments are:

- ALFA TEAM                      Boeing in a global war with EADS
- BRAVO TEAM                    NBA as a global example of globalization
- CHARLIE TEAM                NATO as a post WWII relic in a new world order transition
- DELTA TEAM                    FED as the “manager of the world’s money supply” facing a hurricane
- ECHO TEAM                     OPEC as the balance of power in petro-politics transitions

The team will develop a presentation for their enterprise that captures the following:

- Overview of the enterprise’s global position against the backdrop of the global economy
- Enterprise Mission / Vision / Stated Values
- 3 Core operating strategies with examples of their existence
- Managing the public face of the enterprise via advertising/ media / messages
- Business ethics policy
- CEO profile
- Assess the corporate culture
- Would you want to work there - why / why not?
- From what you know, if you had the magic wand, what would you do differently?

## THE STUDY MISSION

An innovative means to see firsthand the scope of business issues faced strategically and tactically is to conduct a team study mission at an actual commercial enterprise. Everything that will be taught, observed, researched will be targeted at developing a business plan for a good or service to market to a private investor group, the Black Squirrel, LLC leadership. To prepare you for that, due diligence is the process to establish transparency which means to be able to see all the cards that are on the table of a business and thus to assess the value of the business and leadership for investment / purchase or not. Due diligence is both a strategic initiative and a tactical component of business today. This course is about the exploration of what makes a business effective and competitive. It is about grasping:

- Management organization
- Leader profile
- Financial status to assess growth status and stability as a platform for growth
- Cultural values of the organization
- Target demographic
- Marketing strategy/ techniques / strategies / successes / failures
- Benchmarking and competitor analysis as a system / examples / lessons learned
- Regional demographics of the enterprise
- Communications strategies / systems

- Competitor intelligence gathering process and examples of information gained
- Industry challenges
- Business ethics policy
- Global recession impact / implication
- Social responsibility policy and examples
- Technology good / bad going forward and “war stories”
- Human resource management policies and strategies
- Quality management systems and policy
- Union status and strategy / processes to remain union-free
- Mission, Vision, Strategies, Values, Goals

Those items, as minimum, form the skeleton of a business enterprise. To make this very real, each of the ten teams will be assigned a regional business to visit with the leadership to discern to the depth possible a snapshot of the items listed above. From the principles we will be learning in class as the backdrop for this project, the teams will develop a comprehensive presentation for the end of course final project summation. By the way, many of the business leaders from these assigned businesses are scheduled to address the class as part of the Roadmap of learning. The teams are encouraged to invite some of the people they will meet and work with at their assigned business to attend the final project presentation so we can recognize them and they can see their input turned into learning via your presentation.

The COO in working with the team leaders will ensure each team professional connects with the business leader of the assigned Study Mission location. The team leader will establish contact with the business leader and the whole team will professionally meet with the leader and others at the business location for a question & answer time, tour the facility, perhaps have photos made with the team and the business leadership. So personal appearance, punctuality, predetermined questions, mannerly interface are all components of a professional site visit. I will seek input from your business point of contact after the visit to assess how professionally the visit was conducted from beginning to completion. I want the teams to gain enough information and knowledge about their assigned business that in the summation presentation they will strive to “sell” the business to the rest of the class. Remember, on these study mission visits you go as ambassadors of Kent State University, yourselves and me so I will keep a very close eye on this whole process from beginning to end.

This, to me, IS a finite, kinetic, dynamic process of truly exploring a business to see first-hand the business policies and strategies that must integrate to be competitive or not. It begins and ends with a plan that must be executed with fervor, energy but also be flexible to be able to adjust based on the real-world reality. All plans change when the first shot is fired General Eisenhower noted which is so true. The assigned companies / businesses are:

- |   |                |         |
|---|----------------|---------|
| • Chick-fil-A – Canton, OH                    | Doug Pugh      | ALFA    |
| • Hartville Hardware – Hartville, OH          | Howard Miller  | BRAVO   |
| • Saturn of Belden Village – Canton, OH       | Brian Wells    | CHARLIE |
| • First Communications – Fairlawn, OH         | Ray Hexamer    | DELTA   |
| • Hamrick Manufacturing Company – Ravenna, OH | Jordan Hamrick | ECHO    |

# **RESEARCH PAPER / PRESENTATION**

Writing skills as well as effective presentation delivery skills are vital in today's global commercial world. Therefore, a team-based research project / paper / presentation are assigned. The paper will be approximately 5-7 pages in length, double spaced with a font of Arial 12. The presentation will be a maximum of 5 PowerPoint charts. The topics are shown on the assigned class dates in the Roadmap

## **GLOBAL TOUCHPOINTS**

Each team will be assigned a key nation in the global economy. That team is to track events in that nation as well as key economic indicators to provide input and updates to the class on an ad hoc basis. This is not a presentation but rather a running stream of knowledge turned to dialog as each team teaches the rest of the class about their nation in the supply chair of global activity. I want each country compared to the same key indicators of the USA and the consolidated BRIC for a sense of relativity. The key indicators are:

- Gross Domestic Product
- GDP breakdown ... Agriculture %, Manufacturing %, Service %
- GDP per capita
- Population
- Misery Index
- DJIA country equivalent stock index history five year history and current performance

The team assignments are:

- |           |        |                          |
|-----------|--------|--------------------------|
| • ALFA    | Brazil | Bovespa                  |
| • BRAVO   | Russia | RTSI                     |
| • CHARLIE | India  | BSE                      |
| • DELTA   | China  | Shanghai Composite Index |
| • ECHO    | Japan  | NIKKEI                   |

# THE ROADMAP

## CLASS 1 MON JUL 20

- Introductions / Expectations
- Plato's Cave and seeking the new reality for leaders
- $GDP = C + I + G + (X - M)$
- Behavior & Productivity formulae for effective leadership
- Global touch point
- Basic model of Strategic Management
  - Environmental scanning
  - Strategy formulation
  - Strategy implementation
  - Evaluation / Control

## CLASS 2 TUE JUL 21

- Syllabus blocks of work review / clarification / finalization

## CLASS 3 WED JUL 22

- **READ CHAPTER 1: Strategic Management & Strategic Competitiveness**

Boeing & Airbus as a strategic approach

Boeing Profile / Dreamliner Strategy

ALFA

Airbus Profile / A380 Strategy

BRAVO

Stakeholders and their importance

CHARLIE

Define strategic management process

DELTA

Define / illustrate Competitive Advantage

ECHO

- Getting the cards, all the cards, on the table; The Power of Due Diligence

Stan Arner

## CLASS 4 THU JUL 23

From the Dean ... the challenges before you!

Dean Yank Heisler

- **READ CHAPTER 2: The External Environment and Competitor Analysis**

- Wal-Mart & Target Profile

ALFA

- Illustrate / define The External Environment

BRAVO

- Define Scanning

CHARLIE

- Define Monitoring

DELTA

- Define Forecasting

ECHO

### **READ CHAPTER 3: The Internal Organization**

Profile Hyundai

ALFA

The Pepsi Debacle

BRAVO

Intangible / Tangible resources defined

CHARLIE

Toyota Code of Conduct

DELTA

Explain the value of core competencies

ECHO

## **CLASS 5 MON JUL 27**

- **READ CHAPTER 4: Business Level Strategy**
- Global touch point  
Communication as a strategic footprint to effectiveness Sue Grabowski - CEO
- Team Business plan presentations ... This is what we are going to do!

### **STRATEGIC MANAGEMENT OVERVIEW**

- Define strategic scanning and its importance ALFA
- Strategic formulation is the foundation for the journey; describe BRAVO
- What is a strategic implementation team's role? CHARLIE
- What triggers serious strategic management activities with examples DELTA
- Michael Porter is a strategic management guru; profile Dr Porter and his work ECHO

## **CLASS 6 TUE JUL 28**

- **READ CHAPTER 6: Corporate-Level Strategy**
- The Goodyear Tire & Rubber Company' Strategic Focus as a Global Company  
Goodyear Tire & Rubber Company Quality Policy Don Stanley  
Goodyear Lean / 6 Sigma as a business strategy Dave Woodyard  
Herby and his role in Value Creation / Lean Manufacturing Jim Williams

## **CLASS 7 WED JUL 29**

CONTINUOUS IMPROVEMENT & CUSTOMER SERVICE in real time:

Managing Customer Service at Chik Fil-A Doug Pugh  
Business fundamentals under the Golden Arches J.T. Ansel

### **READ CHAPTER 5: Competitive Rivalry / Dynamics**

Profile HP ALFA  
Profile Dell BRAVO  
Define the battle HP / Dell CHARLIE  
Competitor analysis defined DELTA  
Pricing aggression strategy at Wal-Mart ECHO

## **CLASS 8 THU JUL 30**

- **READ CHAPTER 7: Acquisition**
- Merger vs. Acquisition ALFA  
Define hostile takeover; Goodyear example BRAVO  
Integration issues / opportunities CHARLIE  
Culture implications from acquisition DELTA  
Synergy defined / illustrated ECHO
- Site visit team preparation  
Interview questions  
Personal appearance  
On-site team conduct  
Post visit conduct  
Expectations of the presentation to Black Squirrel, LLC

## CLASS 9 MON AUG 3

- **READ CHAPTER 8: International Strategy**
  - SAIC profile ALFA
  - Define / example International Strategy BRAVO
  - GM; the autopsy report CHARLIE
  - Define international business level strategy DELTA
  - Profile Toyota's international strategic issues ECHO
- Global touch point
- "Go Long ...!" debate
- Strategic Debate: The Tet Offensive Strategy defined through the lens of history

## CLASS 10 TUE AUG 4

- Decision gates toward merger / acquisition – First Comm in growth mode Ray Hexamer - CEO
- **READ CHAPTER 9: Cooperative Strategy**
- Gaining Consensus & Lost at Sea
- IBM Profile ALFA
- A joint venture / equity alliance / inequity alliance BRAVO
- Goodyear / Dunlop profile CHARLIE
- Kodak as a strategic partner story DELTA
- Profile Carlos Ghosn as a strategic leader ECHO

### GLOBALIZATION OF THE NBA

- Profile the NBA organization & economics ALFA
- Profile David Stern and his vision for the NBA BRAVO
- International player personnel profile today CHARLIE
- NBA as a strategic perspective in the 21<sup>st</sup> century DELTA
- China and the NBA as a horizon of strategic expansion overview ECHO

## CLASS 11 WED AUG 5

- **READ CHAPTER 11: Organization Structure / Controls**
- **Strategic Team Topics answering ... what is the STRATEGIC purpose for:**
  - Shaq to Cleveland ALFA
  - Drug testing in professional sports BRAVO
  - Iran having nuclear capability CHARLIE
  - A two-front war in Iraq & Afghanistan DELTA
  - The Federal Reserve Board system ECHO
- **RESEARCH PAPERS**
- The Toyota Production System root structure and DNA today ALFA
- "The Oprah Effect" defined, quantified and strategic management implication BRAVO
- The strategic dimension of a NASCAR crew chief as the organizational leader CHARLIE
- Dissect Operation Neptune as a strategic initiative with huge tactical requirements DELTA
- Define and delineate Moral Hazard and Systemic Risk exemplifying today's world ECHO

## CLASS 12 THU AUG 6

- Course evaluations

### STUDY MISSION SITE VISITS

- |                                 |                |         |
|---------------------------------|----------------|---------|
| • Chick-fil-A                   | Doug Pugh      | ALFA    |
| • Hartville Hardware            | Howard Miller  | BRAVO   |
| • Saturn of Belden Village      | Brian Wells    | CHARLIE |
| • First Communications          | Ray Hexamer    | DELTA   |
| • Hamrick Manufacturing Company | Jordan Hamrick | ECHO    |

## CLASS 13 MON AUG 10

- Global touch point
  - Organized labor's strategic transformation in a global economy
- Chris Ricker

### JAPANESE QUALITY LEADERSHIP DNA

- |  |         |
|--|---------|
| • Profile Japan pre / post World War II economics / government | ALFA    |
| • Cultural reality of the Emperor and especially Hirohito      | BRAVO   |
| • Profile Douglas MacArthur and role as Occupation Commander   | CHARLIE |
| • Profile the Japanese soldier and national commitment         | DELTA   |
| • Profile Ed Deming and Joe Juran and their theories           | ECHO    |

## CLASS 14 TUE AUG 11

### THE STUDY MISSION FINDINGS

- |                                 |         |
|---------------------------------|---------|
| • Chick-fil-A                   | ALFA    |
| • Hartville Hardware            | BRAVO   |
| • Saturn of Belden Village      | CHARLIE |
| • First Communications          | DELTA   |
| • Hamrick Manufacturing Company | ECHO    |

## CLASS 15 WED AUG 12

- The strategic mandate for effective business ethics and governance
- Todd Snitchler  
State Representative
- **READ CHAPTER 10: Corporate Governance**
    - Sarbanes / Oxley history / evolution
    - The Tyco Meltdown of Ethics
    - Role of Board of Directors
    - Managing executive compensation
    - Define / illustrate managerial defenses
- ALFA  
BRAVO  
CHARLIE  
DELTA  
ECHO

## CLASS 16 THU AUG 13

- **READ CHAPTER 12: Strategic Leadership**
- Global Healthcare Challenges and Opportunities in Canton

Ed Roth - CEO

### THE END OF DETROIT

### ALFA - BRAVO - CHARLIE

- General Motors & UAW history & strategic perspectives
- Ford & UAW history & strategic perspectives
- The Japanese transformation in the 1980s overview & Toyota
- Transplants in the South; why and snapshot today
- The Meltdown / The Taxpayer / The Government & The Car Czar

### • THE GOAL

### DELTA – ECHO - FOXTROT

- The Theory of Constraints / Herby
- Set the context of The Goal & SWOT
- Jonah & factory characters
- Alex Rogo & Mrs. Rogo
- Peach and pressure as a motivator / or not

## CLASS 17 MON AUG 17

### STRATEGIC LEADERSHIP PROFILING

- ALFA Boeing in a global war with EADS
- BRAVEO NBA as a global example of globalization
- CHARLIE NATO as a post WWII relic in a new world order transition
- DELTA FED as the “manager of the world’s money supply” facing a hurricane
- ECHO UAW as a collective bargainer of a defunct USA auto industry transitions
- The Headwinds of Healthcare in 21<sup>st</sup> century as a strategic issue Jim Williams

## CLASS 18 TUE AUG 18

### • **READ CHAPTER 13: Strategic Entrepreneurship**

- Final team business plan presentations
- SWOT the course / Lessons Learned

- General Motors & UAW history & strategic perspectives ALFA
- Ford & UAW history & strategic perspectives BRAVO
- The Japanese transformation in the 1980s overview & Toyota CHARLIE
- Transplants in the South; why and snapshot today DELTA
- The Meltdown / The Taxpayer / The Government & The Car Czar ECHO

### LEADERSHIP IN THE JUDICIARY

- Constitutional foundation for the Supreme Court and her check & balance role
- Describe the power to make law by the Supreme Court
- Why is appointing a Justice such a legacy issue for a sitting President
- Key landmark decisions by the Supreme Court
- Role of the Chief Justice and Profile John Roberts
- Autopsy of Sotomayor issues unfolding from a leadership perspective
- Key civil rights Supreme Court decisions and implications today
- Profile the current Supreme Court justices and salary
- Profile Roe V. Wade while defining Due Process and Stare Decisis

**INTEGRATED BUSINESS POLICY / STRATEGY SUMMER III 2009**

20

**PROFESSOR JIM WILLIAMS**

**KENT MAIN CAMPUS BSA 213 MTWR NOON – 1:55 PM**

**11:08 AM 7/22/2009**

## CLASS 19 WED AUG 19

- Veyance Technologies, Inc strategic business plan presentation Nat Leonard  
www.goodyearep.com

## CLASS 20 THU AUG 20 FINAL EXAMINATION

- Turn in Final examination / personal journals / Team Evaluations
  - Lessons learned from team global professorship
  - **Black Squirrel Private Equity, LLC Team Strategic Plans**
- 
- ALFA TEAM MacWhop ½ pounder 'burger w/o calories for \$1.50 per sandwich
  - BRAVO TEAM Nuclear powered automobile Iced ketchup fountain drink
  - CHARLIE TEAM Musical textbook for second grade school age children
  - DELTA TEAM Vietnamese restaurant featuring roasted dog to go
  - ECHO TEAM Wind powered bicycle

## POLICIES ATTENDANCE

**My EXPECTATIONS ARE SIMPLE, CLEAR AND WITHOUT OPTION ... I expect you IN CLASS FOR EACH SCHEDULED CLASS ... there you have it!!!!**

Come to class prepared to discuss the assigned topic/s for that class. If you are unable to attend a class for whatever reason, you should consult with your team leader, your COO and me prior to the class if at all possible. **Roll will be taken at each class.** Contact can be made via telephone, email or in person. Apologies received after the class has concluded will not be accepted, unless accompanied by a written excuse for a MEDICAL REASON FROM A LICENSED PHYSICIAN. I AM AVAILABLE TO YOU VIA EMAIL ALMOST LITERALLY 24 / 7 / 365 so not having access to me will not be a valid excuse. I insist on close email linkage throughout the course and that runs from you back to me also, please.

The grading implication of non-attendance is SIMPLE, CLEAR and WITHOUT OPTION and fits within KSU policy that can be found at: <http://www.kent.edu:80/policyreg>:

- 1 - 2 unexcused absences = half letter grade from final course grade
- 3 - 4 unexcused absences = full letter grade from final course grade
- 5 unexcused absences = two full letter grades from final course grade
- **More than 5 = failing grade for the course**

Excused medical absences are the only exception to this count. Please know that the appropriate university procedures will be initiated if it is necessary to validate medical absences. Attending class is a Return on Investment discussion for me. Somebody is paying a great deal of money for you to be in my class so it is incumbent on me to do the best I can do to yield a satisfactory or better ROI to that person footing the financial bill which is measured in your learning and final grade. So I want, need and expect you to do your part of the equation every scheduled class we have together. I will be the example for I will NOT miss a class unless hospitalized or in the funeral home and I am not trying to be cute when I say that for that is how serious I am about your attendance. **IT IS VITAL!**

Academic honesty: Cheating means to misrepresent the source, nature, or other conditions of your academic work (e.g., tests, papers, projects, assignments) so as to get undeserved credit. In addition, it is considered to be cheating when one cooperates with another in any such misrepresentation. The use of the intellectual property of others without giving them appropriate credit is a serious academic offense. It is the University's policy that cheating or plagiarism result in receiving a failing grade for the work or course. Repeat offenses may result in dismissal from the University.

The course withdrawal deadline is Summer III 2009 course withdrawal deadline is **Monday, August 10, 2009.**

## **DISABLED STUDENTS**

University policy 3342-3-01.3 requires that students with disabilities be provided reasonable accommodations to ensure their equal access to course content. If you have a documented disability and require accommodations, please contact the instructor at the beginning of the semester to make arrangements for necessary classroom adjustments. Please note, you must first verify your eligibility for these through Student Accessibility Services (contact 330-672-3391 or visit [www.kent.edu/sas](http://www.kent.edu/sas) <<http://www.registrars.kent.edu/disability/>> for more information on registration procedures).

## **REGISTRATION**

Students have responsibility to ensure they are properly enrolled in classes. Should you find an error in your class schedule, you need to correct the error with your advising office no later than Wednesday, May 27, 2009 for Intersession 2009 – Thursday, June 18 for Summer I – Sunday, June 21 for Summer II - and Thursday, July 23 for Summer III. If registration errors are not corrected by these dates and you continue to attend and participate in classes for which you are not officially enrolled, you are advised now that you **will not** receive a grade at the conclusion of the semester for any class in which you are not properly registered.