



# LINCOLN UNIVERSITY

## BA 490B – Business Strategy and Decision-Making for Finance Management

### COURSE SYLLABUS

**Fall 2024**

**Instructor:** Professor Themis D. Pantos, Ph.D.,  
**Lecture Schedule:** Thursday, 12:30 – 3:15 PM  
**Credits:** 4 units (3 units / 45 lecture hours + 1-unit individual research project)  
**Level:** Mastery 2 / Research (M2R)  
**Office Hours:** Monday, 1:00 PM – 4:00 PM or by appointment  
**E-mail:** [tpantos@lincolnuca.edu](mailto:tpantos@lincolnuca.edu)  
**Phone:** 510 628-8013

**Textbook:** Exploring Strategy: Text and Cases, by Gerry Johnson, Richard Whittington, Kevan Scholes, Duncan Angwin and Patrick Ragner, 11<sup>th</sup> Edition, Pearson Education Limited, 2017, Harlow, United Kingdom.  
**ISBN 978-1-292-14516-7**

**Prerequisites:** *BA 301, BA 304, BA 307, BA 320, BA 340 and at least two concentration courses.*

**Last Revision:** August 14, 2024

#### CATALOG DESCRIPTION:

Students are expected to develop an in-depth understanding of the concepts and application of the opportunities and risks that confront a company seeking to grow globally. The emphasis is on the practical application of strategic concepts to both corporate and business level operations and managerial decision-making. Readings and case materials are reinforced with participation through written tests, research papers and oral presentations. This is the MS program capstone course for the International Business concentration. A one-unit written research project and its oral presentation are required for the course. (4 units)

#### DETAILED COURSE DESCRIPTION:

Today's business firms develop, grow, and operate in an extremely complex and often fiercely competitive marketplace. Decisions that managers make must, therefore, be based on the most complete and current information available about their markets, products, technology, and

resource availability. Such decisions require inputs from many sources and disciplines and must, by virtue of their complexity, draw upon the skills, knowledge, and experience of the entire management team.

Successfully competing in a rapidly evolving global business environment depends upon management creating a strategic focus and coherent plan for growth, innovation, and superior financial performance. Ultimately, it is management's careful consideration and blending of information, opportunity and resources that form decisions that have strategic value in terms of the continuing successful development of the firm.

### **EDUCATIONAL OBJECTIVES:**

This course will focus on the corporation and the set of strategic factors that underlie the basis for formulating and implementing management decisions. These strategic factors have both internal and external impact on the firm in terms of influencing both the organization of the business and its outreach to and interaction with the global marketplace.

Cases will be used to illustrate how business firms develop strategic responses and management decisions to critical issues such as competitive threats, technology change, growth opportunities and financial performance. Emphasis will be placed on the analytical techniques and tools for creating useful and valid business, market and financial information that becomes the foundation for the development of strategic management decision making.

In addition to a mid-term and final exam, students will be required to participate in a Strategic Management decision process that involves the development and implementation of operating strategies and decisions that determine firm's financial performance, operating effectiveness, and growth. A core learning experience in this course is involving students in the process and methodology used to analyze a complex business to determine and critique the company's strategies and decisions that best support and result in the successful operation and profitable growth of the company they are responsible to manage.

### **LEARNING OUTCOMES:**

The combination of assignments discussed under Learning Objectives are designed to provide measurable student learning outcomes in the following business and management areas:

- 1) leadership skills.
- 2) collaboration and teamwork.
- 3) analytical skills.
- 4) financial management skills.
- 5) operations management skills.
- 6) marketing management skills.
- 7) human resource management skills.
- 8) strategic analysis and planning capabilities.
- 9) understanding of corporate social responsibility.

Course assignments given during this course will be explained in terms of these learning outcomes elements and how they are measured and calculated. As a capstone course, students are expected to demonstrate the ability to integrate a broad base of business information, apply the appropriate tools for analyzing data developed and collected, and make considered and complex strategic business plans and decisions.

**COURSE LEARNING OUTCOMES<sup>1</sup>**

	<b>Course LO</b>	<b>Program LO</b>	<b>Institutional LO</b>	<b>Assessment</b>
1	Employ analytical techniques and tools to create valid information in support of decision-making	PLO 1	ILO 1c, ILO 2c	Case studies. Midterm/final examinations.
2	Formulate and implement strategic responses to change in external and internal environment	PLO 2	ILO 1c, ILO 2c, ILO 4c	Case studies. Midterm/final examinations.
3	Evaluate potential global business opportunities and risks	PLO 3	ILO 2c, ILO 7c	Case studies. Midterm/final examinations.
4	Define corporate development objectives that allow to achieve and sustain competitive advantage	PLO 5	ILO 4c, ILO 5c	Case studies.
5	Manage corporate social responsibilities issues within a context of strategic development	PLO 6	ILO 3c	Case studies.

**INSTRUCTIONAL METHODOLOGY:**

This course emphasizes a realistic look at how moderate to very large size firms develop and make strategic decisions. The approach includes an appraisal of the strengths, weaknesses and opportunities facing companies and uses real business cases as the basis for analyzing and evaluating company responses. Students are expected to have read the text and case assignments prior to class meetings. Class discussions will be based on an examination of the assigned text material and illustrative cases. The assigned textbook is to be considered a basic resource providing a presentation and explanation of strategic business concepts and the formative factors that guide and determine management decision-making. The assigned textbook readings parallel case assignments and class discussion topics. It is important that both the reading and case assignments are completed in preparation for productive class discussions.

In addition to the case assignments, students will be organized into teams and participate in the operation of a pilot project company. Student teams will be required to make repetitive decisions regarding key strategic elements of the company based on their interpretation of the firm's competitive environment, financial and operating ratios, the economic climate, and periodic problems that arise during the various phases of the business cycles.

<sup>1</sup> Detailed description of learning outcomes and information about the assessment procedure are available at the [Learning Outcomes Assessment](#) section of LU website.

**READING AND PROBLEM ASSIGNMENTS:**

Reading assignments from the text, *Exploring Strategy: Text and Cases* provide background concepts and analytical tools useful in evaluating assigned cases. Case assignments are used primarily for purposes of providing practice in the development of useful information forming the basis of management strategies and decision-making.

Assignments and projects require students to actively use resources of the library. Detailed guide to business *resources of the library* as well as the description of Lincoln University approach to *information literacy* are available at the [LU Library](http://lincolnuca.libguides.com) website (lincolnuca.libguides.com).

**COURSE REQUIREMENTS:**

Successful completion of this course requires:

(1.) an in-depth analysis of a Business Case including an analysis of the company's market position, strategic initiatives and focus, strengths, weaknesses, opportunities, technology, competitive environment, resources, and financial condition.

(2.) active participation in the Case discussion.

Teams will be formed for both requirements. Each team will have a different case assigned for their analysis. Teams will be judged on their success or failure relative to competing teams. At the beginning of this course instructions will be provided related to these assignments including the:

- (i.) development of the case analysis, assessment of the company's strategies, key decisions, financial condition and performance, evaluation of the company's successes and failures, formation of a set of recommendations and the submission of a completed team project report.
- (ii.) economic and financial validity of their results.

The final team case report requires and oral presentation that I will schedule and a written report due to me by Wednesday, December 6, 2023, MS Degree Program students are also required to develop and present an individual case-based research study required for the additional one unit of credit. This individual report is due on December 6, 2023.

**COURSE STANDARDS:**

A. Students are expected to attend each class meeting and be prepared to discuss the assigned text and case materials. Students who come to class late will not be admitted until the break period. Every member of the class is expected to participate in discussions surrounding the assigned chapter and case content.

B. Each student is required to purchase the course textbook and to be an active participant in the team case analysis.

**BASIS FOR GRADING:**

A. The Comprehensive Case Analysis assignment requires student teams to select a case to work on from a list I will provide. Once the team has selected a case, they should begin

to organize their effort and assign individual members of the team specific tasks and give me a list of the team's members and their individual assignments as soon as it is complete. During the semester I will monitor each team's progress. Grades for the completed project will be based on the quality and completeness of the case analysis, the effectiveness of the team's oral presentation, and the organization and content of their written report including appropriate documentation and identification of sources and the correctness of spelling and grammatical usage of the English language.

- B. The Team evaluation exercise will be graded based on:
- 1) the rationale behind the periodic decisions made by the team.
  - 2) the company performance in comparison to the achievements of competing teams.
  - 3) the demonstrated ability of the team to work together in determining their strategic decisions.
- C. Calculation of Course Grades

### **GRADING POLICY AND GRADE ASSESSMENT:**

Your performance in this course will be evaluated under the following Grading Scale Model

Team Case Oral Presentation:	25%
MS Written Case Project	25%
Final Examination:	50%
Total:	100%

### **GRADING SCALE:**

The grade will be based on a curve, reflecting the standards of Lincoln University. The following table details the satisfactory cut points for the grade, and the corresponding grade.

Grade	A	A-	B+	B	B-	C+	C	C-	D+	D	F
Points	93-100	89-92	85-88	80-84	75-79	70-74	65-69	60-64	55-59	50-54	0-53

The final examination will include both types of theoretical and empirical questions and problems that are similar to the term case assignments. They are designed to test both theory and problem solving. There will be NO "make-up credit" or "extra credit" work during and after the semester. The instructor reserves the right to modify the grading system based on class performance and notification to the students about any change during the semester.

You are responsible for keeping apprised of any change in syllabus. If you plan to be sick on exam days, please do the exam a day earlier before getting sick. The key to success in this course is communication and interaction. Thus, we will have to work as a team. First, we will create a positive learning environment where everyone can participate without fear. Second, relevant reading and problem assignments will be presented and discussed in class. When in doubt, ask.

**Scholastic Dishonesty:**

Scholastic dishonesty will not be tolerated. Students who violate rules of academic dishonesty are subject to disciplinary penalties, including failure in the course and/or other actions from the University.

**COURSE OUTLINE AND ASSIGNMENTS:**

<b>Week/Time</b>	<b>Topic</b>	<b>Reading &amp; Case Assignments</b>
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**Part I****Concepts and Techniques for Crafting and Executing Strategy****Section A: Introduction and Overview**

Week 1	What is Strategy and Why is it Important? Explanation of the Course Requirements	Text: Chapter 1
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Week 2	Charting a Company's Long-Term Direction Team Development for Case Study	Text: Chapter 2
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**Section B: Core Concepts and Analytical Tools**

Week 3	Evaluating a Company's External Environment	Text: Chapter 3
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Week 4	Evaluating a Company's Resources and Ability to Compete Successfully	Text: Chapter 4
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**Section C: Crafting a Strategy**

Week 5	The Five Generic Competitive Strategy Options Team Oral and Written Case Planning Meetings	Text: Chapter 5
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Week 6	Supplementing the Chosen Competitive Strategy	Text: Chapter 6
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Week 7	Strategies for Competing Internationally or Globally	Text: Chapter 7
Week 8	Review of Competitive Strategy Concepts	Instructor's Notes
Week 9	Discussion of Team Case Assignment Consultation with Teams on the Simulation	Guide to Case Analysis (Provided)
Week 10	Diversification Strategies	Text: Chapter 8
Week 11	Team Simulation and Case Study Discussion and Planning Session	Case: ALPHA INC
Week 12	Strategy, Ethics, and Social Responsibility	Text: Chapter 9 Case: Profit in Pain
Week 13	Building an Organization Capable of Good Strategy Execution Discussion of Strategic Financial Analytical Techniques	Text: Chapter 10
Week 14	Managing Internal Operations: Actions that Promote Good Strategy Execution Corporate Culture and Leadership-Keys to Good Strategy Execution	Text: Chap. 11 Text: Chap.12
Week 15	Student Team Case Analysis and Presentations	

**Comprehensive Team Case Projects Due in hardcopy on the last day of the Fall 2024 semester.**

## INDIVIDUAL RESEARCH PROJECT (1 unit)

Each student registered for a 400-level course must complete a one-unit research project in addition to the coursework described in this syllabus. The specific topic will be assigned by the instructor.

The project requires 45 hours of independent study with regular consultations in accordance with the schedule determined by the instructor. The project work results in a written report (not less than 15 pages; APA style) and an oral presentation during the class session.

Evaluation of the student's work on the Individual Research Project will be done using the following rubric:

<b>WRITTEN REPORT</b>				
	<i>Exceeds Standards</i>	<i>Meets Standards</i>	<i>Does Not Meet Standards</i>	<i>Not Present</i>
<i>Research Problem Statement</i>	The statement of a research problem is crystal clear, novel, and thought provoking	Clearly and concisely identifies a research problem	The statement of a research problem is incomplete, lacking precision.	The statement of research problem is absent.
<i>Organization</i>	The report is logically organized; ideas are exceptionally well-developed and support a thoughtful and engaging conclusion.	The development of ideas is present; the conclusion is effective and directly addresses the original thesis.	Organization is confusing, disjointed, and inconsistent; ideas, if present, are not developed; the conclusion is vague and/or does not address the original thesis.	The report lacks organization
<i>Sources and formatting</i>	A variety of high-quality sources is used; all factual claims are supported with citations.  The report follows the APA style guidelines.	A few high-quality sources are used; majority of factual claims are supported with citations  The report mostly follows the APA style guidelines.	Sources used are of a questionable quality; factual claims are not supported.  Use of APA style is inconsistent.	Sources are not identified or of a poor quality; factual claims are unsubstantiated.  The report is poorly formatted

<b>PRESENTATION</b>			
	<i>Exceeds Standards</i>	<i>Meets Standards</i>	<i>Does Not Meet Standards</i>
<i>Style and Organization</i>	Presentation is clear, confident, and fully engaging; the use of visual aids enhance its effectiveness; the presentation is well timed and structured.	Presentation is clear; the use of visual aids is not detrimental to audience engagement; all necessary components are given appropriate time.	Presentation lacks clarity, no attempt is made to engage the audience; visual aids are haphazard and distracting; lack of structure results in an inefficient use of time.
<i>Questions and Answers</i>	Student demonstrates extensive knowledge of the topic by providing confident, precise, and appropriate responses to all audience questions.	Student demonstrates knowledge of the topic by responding adequately to questions of the audience.	Student demonstrates lack of knowledge of the topic by responding inaccurately and inappropriately to audience questions.