

Ateneo Graduate School of Business  
Rockwell Center, Makati City

## **STRATEGIC MANAGEMENT**

Ateneo MBA in Health Program

Revised: January 2015

CENTRAL MANAGEMENT CLUSTER  
Ateneo Graduate School of Business  
Ateneo MBA in Health Program  
Rockwell Center, Makati City

**COURSE TITLE: STRATEGIC MANAGEMENT**

**COURSE CODE: STRAMA**

**COURSE DESCRIPTION AND OBJECTIVES:**

The course serves as the capstone course for the MBA program. It aims to enable the learners develop and implement strategic cross-functional decisions towards the attainment of their organizations' vision, mission and objectives using strategic management principles and integrating knowledge and skills acquired by the learners from the other MBA courses.

The learners will apply the strategic management process consisting of strategy formulation, strategy implementation and strategy evaluation, as well as the various analytical frameworks and strategy formulation tools that can aid them in strategic decision making. Through this course, the learners' strategic thinking capability is expected to be strengthened as they are made to critically analyze and integrate information about their companies' external and internal environment in the local and global context, and to use this in formulating and implementing innovative strategies that can help their companies build a sustainable competitive advantage. The learners will likewise be made to understand the different strategy choices and to evaluate strategic management issues and concepts that are important to managing in today's global environment. This course also aims to promote among its learners ethical business decisions, the practice of corporate social responsibility and making a contribution towards nation building.

**LEARNING OUTCOMES:**

Upon completion of this course, learners are expected to:

1. Craft vision and mission statements that are ethically sound and that take into consideration corporate social responsibility and nation-building dimensions;
2. Identify strategic issues and relevant external and internal factors that need to be addressed by the company;
3. Develop strategic and financial objectives;
4. Formulate appropriate and innovative strategies and programs/action plans to address the strategic issues and to achieve the company's objectives, taking into account relevant external and internal factors; and
5. Design a Balanced Scorecard and a performance monitoring system.

**COURSE OUTLINE:**

SESSION	TOPIC	READINGS/ASSIGNMENTS
1	Introduction Course objectives Course requirements Course overview Introduction to Strategic Management The STRAMA Paper: Outline and Guidelines	F. David, Chapter 1 A. Thompson & A. Strickland, Chapter 1  Read the STRAMA Paper Guidelines in this syllabus.
2	Direction-Setting:  Vision  Mission  Objectives <ul style="list-style-type: none"> <li>• Strategic Objectives</li> <li>• Financial Objectives</li> </ul> Hierarchy of Objectives	F. David, Chapters 2 & 5 (pages 165 – 167 only) A. Thompson & A. Strickland, Chapter 2  <b>Individual assignment:</b> <b>1)</b> Submit the Company Background for your proposed STRAMA paper topic. <b>2)</b> Submit an analysis of the company's mission & vision statements & objectives. Recommend revised mission & vision statements.
3	External & Industry Assessment <ul style="list-style-type: none"> <li>• General environment</li> <li>• Industry/Competitive environment</li> <li>• Identifying the industry's dominant features</li> <li>• Porter's Five Forces of Competitive Analysis</li> <li>• Analytical tools: EFE matrix &amp; CPM</li> </ul>	F. David, Chapter 3 A. Thompson & A. Strickland, Chapter 3  <b>Individual assignment:</b> Prepare and submit the following using your company. <ol style="list-style-type: none"> <li>1) Industry analysis based on Porter's Five Forces</li> <li>2) CPM</li> <li>3) EFE matrix</li> <li>4) Conclusion about your industry attractiveness and situation</li> <li>5) Strategic issues facing your company</li> </ol>
4	Internal Assessment <ul style="list-style-type: none"> <li>• Assessment of company performance</li> <li>• Methodology: David's audit checklist (Management, Marketing, Finance, Operations/Production &amp; Value Chain analysis) or other analytical frameworks</li> <li>• Analytical tool: IFE matrix</li> </ul>	F. David, Chapter 4 A. Thompson & A. Strickland, Chapter 4  <b>Individual assignment:</b>

SESSION	TOPIC	READINGS/ASSIGNMENTS
		Prepare and submit the following using your company (Power Point): <ol style="list-style-type: none"> <li>1) Financial analysis</li> <li>2) IFE matrix</li> <li>3) Internal Strategic Issues</li> </ol>
5	Strategy Choices <ul style="list-style-type: none"> <li>• Hierarchy of strategies</li> <li>• Types of strategies (David's classification)</li> <li>• Porter's generic strategies</li> <li>• Thompson's competitive strategies and strategies for different industries and company situations</li> <li>• Other Strategies</li> </ul> Strategy development for non-profit, non-business oriented organizations	F. David, Chapter 5 A. Thompson & A. Strickland, Chapters 5, 6, 7 & 8  <b>Individual assignment:</b> Prepare and submit an analysis of your company's present strategies.
6	Strategy Formulation Framework  SWOT, SPACE, BCG, IE, GE/McKinsey Matrix, GRAND & QSPM  Evaluating strategy choices	F. David, Chapter 6  <b>Group assignment:</b> Do the following for a selected company: <ol style="list-style-type: none"> <li>1) Present the EFE and IFE matrix</li> <li>2) Develop and present all the strategy formulation matrices (SWOT, SPACE, BCG, IE, GE/McKinsey, Grand &amp; QSPM)</li> <li>3) Make a critical and integrated analysis of the results of your matrices</li> <li>4) Make strategy recommendations</li> </ol>
7	Case analysis exercise  Discussion of the solution to the case exercise	Read Part 6 Strategic-Management Case Analysis (pages 378 – 390)  <b>Group assignment:</b> Prepare a case analysis of a company taken from the textbook (The Professor may assign specific cases). Recommend strategies for the company.

SESSION	TOPIC	READINGS/ASSIGNMENTS
8	Mid-term Exam - Case analysis  The mid-term exam may be given in the classroom; or taken online and submitted through Blackboard or emailed directly to the Professor.	Review all topics discussed from Sessions 1-8.
9	Discussion of mid-term exams (solution and results) Strategy Implementation <ul style="list-style-type: none"> <li>• The Strategy Map</li> <li>• Pre-requisites to effective strategy implementation</li> <li>• Action/Departmental planning</li> <li>• Strategic leadership</li> <li>• Other managerial components in strategy implementation</li> </ul> Strategy Evaluation and Control <ul style="list-style-type: none"> <li>• The Balanced Scorecard</li> <li>• Performance measurement and monitoring</li> </ul>	F. David, Chapters 7, 8, & 9 A. Thompson & A. Strickland, Chapters 9, 10 & 11 Article on the Balanced Scorecard by Norton and Kaplan (Attached in the syllabus).  <b>Individual assignment:</b> Prepare a Strategy Map and a Balanced Scorecard for your company.
10	Other strategic management topics: <ul style="list-style-type: none"> <li>□ Business Ethics</li> <li>□ Social Responsibility</li> <li>□ Environmental Sustainability</li> <li>□ Value Chain Analysis</li> <li>□ Economic Value Added (EVA)</li> <li>□ Market Value Added (MVA)</li> <li>□ Strategic issues in a global environment</li> </ul>	F. David, Chapters 10 & 11 Supplemental materials to be provided by the Professor  <b>Group assignment:</b> Present and submit a group report on one of the special topics assigned. (The Professor may assign different topics for the different groups.)
11 & 12	Individual research time for STRAMA paper	No class sessions
13	Mock Defense: Individual presentation & defense of Strategy paper	<b>Individual assignment:</b> Prepare PowerPoint slides for Mock defense. Submit a draft of your STRAMA paper's External and Industry Analysis, Internal Analysis, Objectives and Strategy Recommendations
14 & 15	Financial Projections & Implications of Strategies Course Integration STRAMA Paper deadlines and Guidelines for Oral Defense Consultation	

## **REFERENCES:**

1. Required Textbook: *David, Fred R.*  
**STRATEGIC MANAGEMENT: CONCEPTS AND CASES, 14<sup>TH</sup> EDITION**  
Pearson Education, Inc., 2013
  
2. Secondary References:  
  
Hitt, Michael A. **THEORY OF STRATEGIC MANAGEMENT, 10TH EDITION**  
Australia: South-Western, 2013  
  
Jones, Gareth R., **THEORY OF STRATEGIC MANAGEMENT, 10TH EDITION**  
Australia: South-Western/Cengage Learning, 2013  
  
Thompson, Arthur A. Jr. and Strickland III, A.J.  
**STRATEGIC MANAGEMENT: CONCEPTS, 11<sup>TH</sup> EDITION**  
International Edition, McGraw Hill Book Co.  
  
Thompson, Arthur A Jr, Gamble, John E and Strickland A J III  
**STRATEGY, CORE CONCEPTS, ANALYTICAL TOOLS, READINGS, 2ND EDITION**  
McGraw-Hill/Irwin, 2006  
  
Carpenter, Mason Andrew and Sanders, William Gerard  
**STRATEGIC MANAGEMENT: A DYNAMIC PERSPECTIVE: CONCEPTS AND CASES**  
Pearson/Prentice Hall, 2007  
  
Davenport, Thomas H, Leibold, Marius and Voelpel, Sven  
**STRATEGIC MANAGEMENT IN THE INNOVATION ECONOMY: STRATEGY APPROACHES AND TOOLS FOR DYNAMIC INNOVATION CAPABILITIES**  
Publicis, 2006  
  
Katsiooudes, Marios I.,  
**STRATEGIC MANAGEMENT: GLOBAL CULTURAL PERSPECTIVES FOR PROFIT AND NON-PROFIT ORGANIZATIONS**  
Elsevier Butterworth-Heinemann, 2006

Other supplementary materials and references will be provided by the professor during the term.

### Other References:

- Occasional Paper or OPS
- OP 1: Towards a More Effective Learning of Strategic Management: How Useful are Analytical Tools?
- OP 11: Measuring the Green Core Competence of the Electronics Industry
- OP 12: Sustainable Tourism in a Low Carbon Economy: The Clark Freeport Zone Case
- SS1: ISO 9001.2000 as Change Strategy

### 3. Web references:

<a href="http://www.quickmba.com/strategy/global/marketentry/">http://www.quickmba.com/strategy/global/marketentry/</a>	Foreign market entry modes, exporting, licensing, joint venture and foreign direct investment
<a href="http://www.businessplans.org/">http://www.businessplans.org/</a>	Discussions about business planning
<a href="http://www.quickmba.com/strategy/levels/">http://www.quickmba.com/strategy/levels/</a>	Describes the role of strategy at the corporate level, business unit level and functional or department level of the firm
<a href="http://www.quickmba.com/strategy/porter.shtml">http://www.quickmba.com/strategy/porter.shtml</a>	Discusses the Porter's Five Forces of Competitive Analysis
<a href="http://www.quickmba.com/strategy/generic.shtml">http://www.quickmba.com/strategy/generic.shtml</a>	Porter's generic strategies: Cost leadership, Differentiation and Focus
<a href="http://www.quickmba.com/strategy/matrix.bcg/">http://www.quickmba.com/strategy/matrix.bcg/</a>	BCG growth-share matrix
<a href="http://www.quickmba.com/strategy/global/diamond">http://www.quickmba.com/strategy/global/diamond</a>	Porter's diamond of national advantage
<a href="http://www.apmforum.com">http://www.apmforum.com</a>	Asian business strategy management research sites; archive, reviewed sites on Asia business management and strategy
<a href="http://www.sigmaresearch.com">http://www.sigmaresearch.com</a>	Research management group; offers lists of qualitative and quantitative research, project management, strategic planning services; also provides research information newsletters
<a href="http://www.northampton.ac.uk">http://www.northampton.ac.uk</a>	Strategic management research cluster: Brings together a group of researchers who share a common interest and expertise in business strategy, marketing, international business and political economy
<a href="http://www.s-m-i.net">http://www.s-m-i.net</a>	Strategic management institute: Provides business and strategy development and conducts market research, industry analysis and business opportunity studies
<a href="http://www.brint.com">http://www.brint.com</a>	The global knowledge network for business, information, technology, and knowledge managers, professionals and entrepreneurs
<a href="http://www.smsweb.org">http://www.smsweb.org</a>	Site of strategic management society: Contains downloadable resource on various conferences pertaining to strategic management concern
<a href="http://sites.krislyn.com/manage.htm">http://sites.krislyn.com/manage.htm</a>	Contains various business and management sites including those on business periodicals
<a href="http://www.roundtable.com/PDBPR?BPR-articles.html">http://www.roundtable.com/PDBPR?BPR-articles.html</a>	Contains various articles on best practices on product development
<a href="http://www.aom.pace.edu/bps/bps.html">http://www.aom.pace.edu/bps/bps.html</a>	Site of business policy and strategy division of accounting and management. Contains working papers and writings in business policy and strategy; also provides link to other websites, organizations and journals
<a href="http://www.bestmanagement.com/">http://www.bestmanagement.com/</a>	Site that aggregates content from over 200 trading organizations and contains extensive library organized into "authorized" key topics such as planning, budgeting and business intelligence
<a href="http://www.2gc.co.uk/resource.asp">http://www.2gc.co.uk/resource.asp</a>	Researches about balanced scorecard, strategic control and management, performance measurement and knowledge management
<a href="http://www.themanager.org/index.htm">http://www.themanager.org/index.htm</a>	Various printable resources on supply chain management, finance, strategy, management, IT, etc.

<a href="http://www.themanager.org/knowledgebase/strategy/index.htm">http://www.themanager.org/knowledgebase/strategy/index.htm</a>	Discusses forecasting, global business, growth, mergers & acquisitions, strategic alliances, strategic planning, etc.
<a href="http://www.mplans.com/ot/features.cfm?id=155&amp;ac=overture.swotanalysis">http://www.mplans.com/ot/features.cfm?id=155&amp;ac=overture.swotanalysis</a>	Features marketing articles and SWOT analysis
<a href="http://www.demon.co.uk/mindtool/swot.html">http://www.demon.co.uk/mindtool/swot.html</a>	Provides topics about SWOT analysis: strengths, weaknesses, opportunities and threats
<a href="http://www.marketingteacher.com/Lessons/lesson_swot.htm">http://www.marketingteacher.com/Lessons/lesson_swot.htm</a>	Provides lectures on SWOT analysis
<a href="http://www.austrainer.com/archives/1397.htm">http://www.austrainer.com/archives/1397.htm</a>	Provides lectures and topics on developing your strategic SWOT analysis
<a href="http://www.wilsonweb.com/wmt5/plan-swot.htm">http://www.wilsonweb.com/wmt5/plan-swot.htm</a>	Describes how to conduct a SWOT analysis to build into your company's marketing plan; studies strengths and weaknesses, opportunities and threats
<a href="http://www.toolkit.cch.com/text/p02_4341.asp">http://www.toolkit.cch.com/text/p02_4341.asp</a>	Discusses SWOT analysis
<a href="http://www.projectlevel.co.uk/business/swot.htm">http://www.projectlevel.co.uk/business/swot.htm</a>	Information on SWOT analysis and how to conduct one
<a href="http://www.accaglobal.com/members/pdm/planning/swot/">http://www.accaglobal.com/members/pdm/planning/swot/</a>	Offers manuals, lectures and topics regarding SWOT analysis
<a href="http://www.findarticles.com/cf_dis/m4256/3_25/55307219/p1/article.jhtml/">http://www.findarticles.com/cf_dis/m4256/3_25/55307219/p1/article.jhtml/</a>	Articles explore the roots of strategic management research and its transformation over the years

### **LEARNING STRATEGIES:**

The following methodologies will be utilized to achieve the learning objectives for the course:

1. Lectures
2. Class discussions
3. Workshop discussions (small groups)
4. Group assignments/reports
5. Individual assignments
6. Conferences, seminars, and symposia when available.

### **COURSE REQUIREMENTS:**

#### **1. Attendance/Punctuality**

Learners are expected to attend all class sessions and be on time. Each session will run for three (3) hours excluding a 30-minute break. Although attendance per se is not given a grade equivalent, it will have a bearing on the learner's participation in class activities.

Learners who miss class sessions are responsible for the lessons taken up and are not excused from the work or assignments for that session.

**The maximum number of absences is three (3), beyond which the learner will receive a "FAIL" grade. Habitual tardiness will be recorded. Tardiness exceeding 30 minutes is equivalent to an absence.**

#### **2. Class Participation**

Each learner is expected to actively participate in discussions by way of sharing one's ideas and experiences relevant to the topic under discussion, giving comments and asking



questions whenever appropriate. In order to participate actively in the class discussion, learners are expected to prepare and do the assignments prior to each session.

### 3. Individual Assignments

Learners are expected to do all assigned activities for each session and submit on time written reports specified in the course syllabus. **Late reports will not be accepted and will not be given any grade credit. Failure to submit individual and group reports will also result to a “Fail” grade.** The learners should be ready with a soft copy of their reports for presentation to the class when called by the professor.

The following rubric will be used in assessing the quality of individual assignments:

Traits	1	2	3	4
<b>Effective Analysis</b>	Presents an incomplete analysis of the issues identified.	Presents a superficial analysis of some of the issues identified; omits necessary financial calculations.	Presents a thorough analysis of most issues identified; includes most necessary financial calculations.	Presents insightful and thorough analysis of all issues identified; includes all necessary financial calculations.
<b>Percentage of Requirements (Exercises/Problems/Cases) Completed</b>	Failed to meet 70% of the requirements.	70-79% of the requirements are completed.	80-89% of the requirements are completed.	95-100% of the requirements are completed.
<b>Writing Mechanics</b>	Writing is unfocused, rambling, or contains serious errors; lacks detail and relevant data and information; poorly organized.	Writing lacks clarity or conciseness and contains numerous errors; gives insufficient detail and relevant data and information; lacks organization.	Writing is accomplished in terms of clarity and conciseness and contains only a few errors; included sufficient details and relevant data and information; well-organized.	Writing demonstrates a sophisticated clarity, conciseness and correctness; includes thorough details and relevant data and information; extremely well-organized.

### 4. Group Discussion/Presentation

Learners will be formed into small groups of 4-5 members and will be asked to apply the knowledge learned from some of the readings and the class discussion, using specific cases assigned by the facilitator or cases that involve companies and organizations that they are familiar with, including their STRAMA paper topic. Each learner is expected to actively

participate in the group discussions and cooperate with the other team members in carrying out and fulfilling the requirements for the group assignment. The facilitator will give a grade for each group output/presentation and will require peer rating and evaluation in giving the individual grades for the group assignments.

The following rubric will be used in assessing the quality of the presentation:

<b>Traits</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>Content</b> <i>Did the presentation have valuable material relevant to the topics assigned?</i>	Presentation contained little to no valuable material.	Presentation had moments where valuable material was present but as a whole content was lacking.	Presentation had a good amount of material (occasionally using exercises and problems to illustrate a concept or citing actual business cases) and benefited the class.	Presentation had an exceptional amount of valuable material (using exercises and problems to illustrate a concept, citing actual business cases) and was beneficial to the class.
<b>Organization</b> <i>Was the presentation well organized and easy to follow?</i>	The presentation lacked organization and had little evidence of preparation.	There were minimal signs of organization or preparation.	Presentation had organizing ideas but could have been much stronger with better preparation.	Presentation was well organized, well prepared and easy to follow.
<b>Presentation</b> <i>Did the presenters speak clearly?            Did they engage the class?            Was it obvious the material had been rehearsed?</i>	Presenters were unconfident and demonstrated little evidence of planning prior to presentation.	Presenters were not consistent with the level of confidence/ preparedness they showed the classroom but had some strong moments.	Presenters were occasionally confident with their presentation however it was not as engaging as it could have been for the class.	Presenters were all very confident in delivery and they did an excellent job of engaging the class. Preparation is evident.
<b>Collaboration</b> <i>Did everyone contribute to the presentation?            Did everyone seem well versed in the material?</i>	The members never worked from others' ideas. It seems as though only a few people worked on the presentation.	The members sometimes worked from others' ideas. However it seems as though certain people did not do as much work as others.	The members worked from others' ideas most of the time. And it seems like everyone did some work, but some people are carrying the presentation.	The members always worked from others' ideas. It was evident that all contributed equally to the presentation.
<b>Use of Media</b> <i>Did the group use any media or materials to support their presentation?            Did they reinforce the presentation</i>	Media is superfluous or nothing was used during the presentation.	Relies heavily on the media used. Materials rarely support the presentation.	Looks at the materials often to keep track of the presentation. They are easy to use and understand.	Media are used effortlessly to enhance presentation. Materials are appropriate, easy to

<i>and are appropriate, easy to understand and attractive?</i>				understand, and attractive.
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## 5. The Strategic Management (STRAMA) Paper

Each learner is expected to have an organization (business or non-profit) that he/she will write about for his/her strategic management (STRAMA) paper.

### a. Concept & Content

The STRAMA paper will be an integrative paper that should reflect the learner's ability in the following areas:

- i. Proper application of the strategic management concepts and tools learned during the STRAMA course;
- ii. Integration of learning from the various MBA subjects through the diligent analysis of economic, industry, competitor and other external data, the analysis and integration of firm-level, divisional and functional issues, and the development of business objectives and strategies that are consistent and supportive of the firm's vision and mission;
- iii. Critical thinking capability as shown in the analysis of external and internal strategic issues of the chosen STRAMA company, and in the formulation of logical, rational and creative strategies;
- iv. Translation of the strategies, plans and programs into a consistent set of financial projections for the plan period, taking into account the resource requirements and financial implications of the strategies, among others.

**The successful presentation and oral defense of the STRAMA Paper is equivalent to passing a comprehensive examination, a requirement for earning an MBA degree.**

Please refer to the section on "The Strategic Management Paper: Guidelines and Suggested Outline" in this syllabus for more details on the content of the STRAMA paper.

In the formulation and development of the STRAMA paper, the learner is expected to undertake **rigorous research** to obtain the needed information relevant to the paper. The learner is also expected to exercise professionalism in the manner of obtaining and using the information and in incorporating the same into the paper.

The appropriate use of the analytical tools should lead to critical factors and issues applicable to the STRAMA Company. It should be noted that the examples provided in the textbook are for discussion purposes, and are oftentimes, general statements. The learner may use these as references; but the expectation is for a more in-depth analysis of information derived from rigorous research and the use of critical thinking in determining the relevance and impact of research findings to the industry and the STRAMA Company.

**b. Guidelines in the Selection of a Company or an Organization for the STRAMA Paper**

- i. The company or organization should preferably be medium-sized or large, domestic or global, and operating for at least four years to make a meaningful analysis of the company's overall performance.

While strategic management is applicable to micro and small enterprises, the learner is not encouraged to adopt small companies and start-ups as STRAMA companies because he/she may be constrained in applying some of the strategic management concepts and tools.

**As a guideline, the company or organization should have an annual revenue (or budget, in case of non-profit or non-revenue generating organizations) of PHP 15 million or more, with at least 15 employees.**

Exceptions to the above will require a written justification from the learner and an assurance that the in-depth research, analysis and critical thinking required from the STRAMA paper can be complied with. The learner needs to discuss this with the STRAMA professor and secure his/her approval.

Non-Government Organizations (NGOs), Not-for-Profit organizations and government corporations / agencies will be allowed as topics for the STRAMA paper but these should be discussed with and approved by the STRAMA professor. The requirements on the minimum number of employees and revenue size should also be complied with. Any exceptions on these requirements also require justification by the learner and approval of the STRAMA professor.

- ii. The learner must have the approval of the company to make it a subject of a STRAMA paper and must be able to draw information about its operating and financial performance.
- iii. The learner should be able to gather sales and marketing, operating, financial, organizational and other relevant data / information on the company's competitors.
- iv. A large business unit within a company may be used for the STRAMA paper provided it has its own financial statements which the learner can access. The requirements on the minimum number of employees and asset size of the business unit should also follow the general guideline above. The learner should be able to identify the specific competitors of the business unit, and secure the marketing, operating, financial, and other relevant internal information about them.
- v. The professor must give clearance to the learner on his/her chosen STRAMA Company or organization.

**c. The Evaluation of the STRAMA Paper and the Oral Defense**

The learner shall submit three sets of his/her STRAMA paper to the AGSB staff-in-charge on or before the deadline, pay the defense fee, and secure the necessary

clearances from the Registrar's office. He/she must also attach the STRAMA Paper Data Sheet (Appendix C), and submit a soft copy of the Strama paper to the AGSB staff-in-charge for the plagiarism test.

The STRAMA paper shall be evaluated on the basis of how well it meets the requirements stated under (a) and (b) above and on how well the learner is able to present and defend it before a panel.

The evaluation of the STRAMA paper and the oral defense will be done jointly by the STRAMA professor who acts as the chair of the panel and two panel members who shall be selected and assigned by the Dean.

The learner will receive a grade for the actual STRAMA paper submitted (to be given a weight of 70%) and for the oral defense (to be given a weight of 30%). The weighted average will then have a weight of 50% in the overall STRAMA grade of the learner (see separate section on the Grading Criteria for the course).

#### **i. The Evaluation of the STRAMA Paper (See Appendices A and B)**

The following criteria will be used for grading the STRAMA paper:

- ❑ **Completeness and technical correctness (40%)** – the degree to which the prescribed content requirements of the paper have been met, at the same time indicating the correct application of the STRAMA concepts, theories and tools.
- ❑ **Critical thinking (40%)** – the ability to integrate information and ideas and carry out a rational and in-depth analysis and the ability to identify key strategic management issues and produce substantive, creative, logical and well-thought out strategy recommendations
- ❑ **Organization and Writing Skills (20%)** - the degree to which the topics have been logically sequenced within sections, use of correct grammar, spelling, tables and figures formats, and appropriateness of language used and the overall written communication skill as reflected in the paper.

#### **ii. The Oral Defense**

The oral defense grade will be based on the degree to which the learner demonstrates mastery of the subject through the presentation of the summary and strategic issues and strategy recommendations and handling of the questions from the panel members. The learner's oral communication skills, clarity and effectiveness of the presentation materials used are also important and will be considered in the evaluation.

On-line oral defense can be availed of by a learner if he/she is unable to return to the school during the allotted time for the defense. An on-line defense fee will be charged for audio/video connectivity costs. Arrangements should be made with the school for this purpose.

For the STRAMA paper and the oral defense, the grade will be determined jointly by the STRAMA professor and the other two defense panel members based on a defined set of criteria and rubrics. The learner's grade for the STRAMA paper and oral defense will be the weighted average of the grades given by the three panel members. If, however, two out of the three panel members give a "FAIL" rating, the learner will automatically get a "FAIL" for the paper as well as for the STRAMA

course regardless of the grade given by the other panel member on the STRAMA paper and regardless of the learner's grade for the class activities.

**Conditions for Re-Oral and FAIL IN THE STRAMA Paper and Oral Defense:**

A grade of 1.0 in either Completeness and Technical Correctness OR in Critical Thinking (see criteria under section c above) given by at least two members of the panel, with the overall weighted average being at least 1.5, will require the student to revise his/her paper and do a "RE-ORAL".

A grade of 1.0 in BOTH Completeness and Technical Correctness AND in Critical Thinking given by at least two members of the panel will already constitute a "FAIL" grade for the learner's STRAMA paper and therefore, also for the STRAMA course.

A student obtaining a weighted average grade of 1.5 for the STRAMA paper but has a penalty of minus 0.5 due to late submission will also receive a FAIL grade for the STRAMA paper and the course. This guideline will also be followed for students who get a Re-oral grade of 1.5 but are penalized with a 0.5 deduction due to late submission.

**d. Deadlines for the Submission and Oral Defense of the Strategy Paper**

The deadlines and timetable for the submission of the STRAMA paper and the oral defense are as follows:

Day 1	End of the term (Reference point is the date of the last session).
Day 30	First deadline on the submission of the STRAMA paper. Learners submitting their papers on or before this deadline will get full credit and grade based on the quality of the paper. They will then be scheduled for oral defense within a maximum of 60 days depending on the availability of the STRAMA professor and the panel members. Learners submitting their papers on Day 31 until Day 60 will get a deduction of 0.5 in their grade on the STRAMA paper.
Day 60	Second and final deadline on the submission of the STRAMA paper. Learners will be scheduled for defense within a maximum of 60 days from Day 60. Learners unable to submit their STRAMA papers on this deadline will automatically get a "FAIL" grade.
Day 90	Final deadline for oral defense and submission of grades of learners who submitted their STRAMA papers on Day 30. Learners unable to defend their STRAMA papers on this deadline will automatically get a "FAIL" grade.
Day 120	Final deadline for oral defense and submission of grades of learners who submitted their STRAMA papers on Day 60. Learners unable to defend their STRAMA papers on this deadline will automatically get a "FAIL" grade.

Note: A student who receives a “Re-oral” grade is given a maximum of 30 days to submit a revised paper and sixty (60) days from the original oral defense date to re-defend his/her revised STRAMA paper. Failure to do so will automatically result in a “FAIL” grade.

**These deadlines and policies shall be strictly implemented. Professors are not authorized to extend deadlines.** Note that the AGSB policy on INCOMPLETE grades will not be applied to the STRAMA course.

**GRADING CRITERIA:**

The learner’s grade for the STRAMA course will be determined as follows:

- Class activities 50%
  - Individual Assignments/reports 25%
  - Group reports/Participation 10%
  - Mid-Term examination 15%
  
- STRAMA paper and Oral defense 50%
  - Grade for paper (70% of 50%) 35%
  - Grade for oral defense (30% of 50%) 15%

A sample grading matrix is shown below:

INDIVIDUAL REPORTS	GRADE		WEIGHT	GRADE	WEIGHTED SCORE
Mission		INDIVIDUAL REPORTS	0.25		
Vision		MID-TERM EXAM	0.15		
Porter Five Forces Analysis		GROUP REPORTS & PARTICIPATION	0.10		
EFE		<b>SUB TOTAL</b>	0.50		
CPM					
Financial Analysis					
IFE		<b>STRATEGY PAPER</b>			
Strategy Analysis		STRATEGY PAPER	0.35		
Strategy Map		ORAL DEFENSE	0.15		
Balanced Scorecard		<b>SUB-TOTAL</b>	0.50		
<b>AVERAGE</b>					
		<b>TOTAL/FINAL GRADE</b>	<b>1.00</b>		
<b>GROUP REPORTS</b>					
SWOT					
SPACE					
BCG					
GE/McKinsey					
IE					
GS					
QSPM					
<b>Analysis and Strategy Recommendation</b>					
<b>AVERAGE</b>					

The final grade of the learners will be given only after completion of their respective oral defense and the submission of the final or revised STRAMA paper, if required by the panel members after the oral defense. Learners who fail the STRAMA Paper and Oral Defense will be considered to have failed the STRAMA course, even if they pass all the classroom activities.

## **THE STRATEGIC MANAGEMENT PAPER: GUIDELINES & SUGGESTED OUTLINE**

### **EXECUTIVE SUMMARY**

Provide a brief summary or overview of the strategy paper (in two pages at most), stating what the business of the company is, the main results of the external and internal analyses, results of strategy formulation tools used, the key strategic management issues and the recommended strategic and financial objectives (at least for the next three years), and strategies and significant action plans.

### **I. INTRODUCTION**

Include a short background on the company

- Nature of business/products/services
- Current revenue size and profit
- Major markets served
- Number of employees
- Other relevant basic information

### **II. RESEARCH DESIGN AND METHODOLOGY**

Identify the following:

- Data and information sources
- How information was obtained & methodologies used
- Major assumptions

### **III. COMPANY'S VISION AND MISSION**

- State the current vision, mission and objectives of the company
- Comment or evaluate the vision and mission statements using David's framework and other criteria discussed in class. Recommend changes if needed. Or, develop new vision and mission statements. Explain how the recommended vision and mission meets the criteria based on David's framework, including how it takes into account ethical principles and nation building.
- Give recommendations on how you will communicate the vision and mission to the employees and other stakeholders.

### **IV. EXTERNAL ANALYSIS**

#### **A. General Environment**

1. Discuss *current and expected outlook* in the following areas, focusing only on factors that will have significant impact on your business. Consider the following areas only insofar as they are relevant, and thus exert a significant impact on your industry.
  - a. Economic developments
  - b. Socio-cultural, demographic trends, lifestyle changes
  - c. Technological developments
  - d. Political, legal, governmental aspects



- e. Ecological aspects
  - f. Other external factors that may be more directly relevant to your business
2. Translate the above in terms of what it means for your business, identifying opportunities and threats that may affect the following:
    - a. Market demand and opportunities
    - b. Types of products and services offered
    - c. Intensity of competition
    - d. Suppliers and distributors
    - e. Costs of doing business
    - f. Other aspects of the business

## B. Industry and Competitor Analysis

1. Analyze the industry's situation and prospects by looking into the following:
  - a. Market size and/or growth rate and stage in the growth cycle
  - b. Number of players and their relative sizes; market share analysis
  - c. Market aspects (products or service, price, promotion, and channels of distribution)
  - d. Buyer/Customer profile
  - e. Factors affecting costs of doing business
  - f. Operations/Production aspects
  - g. Technology developments
  - h. Industry financial analysis (growth, profitability, liquidity, leverage, efficiency)
  - i. Problems in the industry
  - j. Critical success factors in the industry
2. Analyze your industry using Porter's Five Forces framework of competitive analysis and based on the preceding analysis, state your conclusion for each force.
3. Do a competitor analysis:
  - a. Identify your major competitors and provide relevant information for each, e.g. revenue size, financial health, market share, strategies, etc. If there are too many, select and focus only on a few (about two or three) and explain why you chose to focus on these competitors.
  - b. Evaluate your competitors and your company vis-à-vis the critical success factors identified earlier. Do a Competitive Profile Matrix and explain the ratings.

## C. Summary and Conclusion

1. Using the results of your general environment and industry analyses, identify and summarize the major opportunities and threats.
2. Use the EFE matrix tool to assess how well your company is responding to the opportunities and threats in the environment. Make sure that the factors included in your EFE have been discussed in the external and industry analyses and the factors you discussed in your analyses should be reflected in your EFE for consistency. Explain your weights and ratings.

3. Draw your conclusion about the industry's overall prospects and industry attractiveness.
4. Make a conclusion about your current company's competitive position or business strength in the industry, e.g., very strong, strong, middle-ground, weak.
5. Identify key strategic issues related to the external environment that will have a significant impact on your business.

## **V. INTERNAL/COMPANY ANALYSIS**

- A. Review the company's performance in terms of key performance indicators:
  1. Revenue/sales in the past three years
  2. How the company's growth compares with industry growth or vis-à-vis the other players
  3. Profitability, other relevant performance indicators
  4. Applicable financial ratios
  5. Value Chain Analysis
- B. Do an organization diagnosis using:
  1. David's functional audit to assess the different functional areas of the organization
  2. McKinsey's 7S Model or Galbraith's Star Model
- C. From the above, identify the company's major strengths and weaknesses
- D. Use the IFE matrix to evaluate the overall internal strengths and weaknesses of the company
- E. Summary and Conclusion
  1. Identify the major financial and internal strategic issues that the company must address
  2. Identify key organizational elements that may hinder or promote growth and productivity.

## **VI. STRATEGY FORMULATION**

- A. Use the different strategy formulation tools (SWOT, SPACE, BCG, IE, GE/McKinsey, GRAND, and QSPM) and other relevant analytical and matching tools to come up with strategic options and directions for the company. Explain the results of your analyses.
- B. Make sure that your analysis and positioning in the various matrices/cells are consistent with the results of your external/industry and company analyses.
- C. Do a summary and prioritization of the various strategies derived from the various tools. Select the strategies that you will adopt to attain your objectives, and ultimately, your vision.

## **VII. OBJECTIVES, STRATEGY RECOMMENDATIONS AND ACTION PLANS**

## **A. Strategic and Financial Objectives**

1. Provide a clear statement of your strategic and financial objectives for the company or business, for the next three years. It should state measurable objectives, e.g. market position, sales or revenue growth, net income or profit level, profitability or rate of return, etc. (Follow the SMART rule – specific, measurable, achievable, realistic, and time-bound.)
2. Financial objectives: These can be stated in terms of revenue level and growth, and productivity growth (cost effectiveness). Other financial objectives like net income, profit margin, or other appropriate measures of financial performance of the industry / company may be included.
3. Strategic objectives: These should define the major strategic thrust of the company. The strategic objectives should consider the following:
  - a. It must support the company's vision/mission in Chapter III
  - b. It must take into account the expected external/industry prospects as shown in the external and industry analysis
  - c. It must take into account the company's historical performance and current/expected competencies and capabilities
  - d. It must be consistent with the results of your analytical tools under Chapter VI. For example, an aggressive expansion strategy should show more aggressive revenue growth while a "hold and maintain" position should show more moderate growth for the company.
4. The time frame can be anywhere from three to five years hence, depending on the nature of the business and the characteristics of the industry where it belongs.

## **B. Recommended Business Strategies**

1. This should provide a more specific and comprehensive discussion of your proposed strategies consistent with the directions/generic strategies indicated by the strategy formulation tools. Avoid generic and motherhood statements. The strategies should enable the company or organization to achieve its objectives and address the strategic issues identified in your external and internal analysis.
2. If you are dealing with several businesses or product types, you may need to group them or come up with one set of strategies for each business or product type.
3. If you are diversifying into a new business but plan to maintain your existing or core business, you need to specify a set of strategies for both the core and new business.
4. Include functional level strategies for the following areas: Marketing, Sales and Distribution, Operations/Production/Manufacturing, Finance and Human Resources.

## **C. Recommended Organizational Strategies**

1. Identify strategies that will involve the necessary changes needed in order to align the organization with the requirements of the business, given the long-term objectives and strategies.

2. Identify strategies that will address the identified internal strategic issues, address the organizational weaknesses of the company or take advantage of its strengths.

Note that the business and organizational strategies may also be combined if deemed more appropriate.

## **VIII. STRATEGY IMPLEMENTATION**

### **A. The Strategy Map**

Translate your strategy recommendations into a strategy map for the company.

### **B. Departmental Action Plans and Programs**

1. Show that the action plans and programs will support your objectives and strategies.
2. This should outline the different programs and step by step action plans that will be undertaken to progress the implementation of the strategic plan. The action plans can be classified by strategic programs or by department or both.
3. Specify milestones/expected output, timetable and persons or units responsible. Follow the template given in class.
4. The action plans should also consider and indicate the resource requirements (financial, physical, technological and human resources). This will support your financial projections.

### **C. Financial Projections and Overall Evaluation of the Strategies**

1. Show and discuss the long-term financial plan/projections in comparison with historical performance. Show and discuss the projected Income Statement, Balance Sheet and Cash Flows. Indicate ratio to sales and annual growth rates. For non-business oriented organizations, the financial projections may only involve projected budgets, costs or expenses.
2. State your assumptions and explain how your strategies will impact on some of the components of the financial projections. The financial projections should incorporate the financial implications of your strategies and should provide the level of detail needed especially on the costs and expenses.
3. Summarize overall evaluation, and assess the reasonableness, feasibility and acceptability of your strategies.
4. Make sure your strategies have logic based on your external and internal analysis and they will enable the company accomplish its strategic and financial objectives.

## **VIII. STRATEGY EVALUATION, MONITORING AND CONTROL**

- A. Prepare an appropriate Balanced Scorecard for the company as your strategy evaluation and monitoring tool. This should allow the company to evaluate and monitor its strategies from four perspectives: financial performance, customer knowledge, internal business processes, and learning and growth.

- B. In each perspective, the Balanced Scorecard should contain the following: objectives, performance measures, targets, and initiatives. Make sure that these are consistent with your strategy recommendations.

**Additional Guidelines:**

- ❑ Do not be constrained by the company's current strategic plans or what you think will be acceptable to the company's management. What is important is that your recommended strategies follow the logic of your external and internal analyses and your strategy formulation tools and your own strategic insights.
- ❑ Make assumptions whenever necessary, but state these assumptions clearly.
- ❑ Ensure internal consistency of your strategic and action plans with the financial plan/projections.
- ❑ While the STRAMA paper will be evaluated largely on the basis of its logic, substance and content, it should be professionally done and written in formal style using the correct grammar, spelling, choice of words, and proper format. In addition, all tables and figures in the paper should be numbered for easy reference and should have appropriate titles, with units of measures used and data sources indicated. **The previous three years' financial statements should be included in the paper as part of the Appendices.**
- ❑ Acknowledge and cite your references and data sources. Proper footnoting should be followed. Note that the school enforces strict rules against plagiarism.

**ACADEMIC INTEGRITY POLICY:**

Each student is expected to abide by the standards of conduct and expectations of academic integrity that apply to academic undertakings. **In this connection, the student is especially cautioned against plagiarism. All STRAMA papers (the students are required to submit a soft copy of their STRAMA paper) will be subjected to a plagiarism check using software acquired by AGSB for this purpose.** Academic dishonesty will not be tolerated. For the AGSB policy on plagiarism, forms and definition of plagiarism, and penalties and sanctions, please see the Plagiarism Policies and Procedures in the AGSB Student Guidebook.

**COMPONENTS PER MODULE/SESSION:**

In the succeeding section, the components of each session will be described in greater detail in terms of:

- Learning objectives,
- Preparatory assignments, and
- Proposed activities.

Note that for every STRAMA class, it is a must that the learning objectives for each topic are met. **However, it is possible that the facilitator may vary or modify the specific sequencing of the topics and length of time spent for each, the nature of the assignments to be given for both the individual and group projects, and the proposed activities and learning methodologies to be followed.** These modifications may be introduced depending largely on the size and composition of the class. The facilitator may also provide supplementary materials and cases in addition to those suggested in this syllabus.

## SESSION 1

### THE NATURE OF STRATEGIC MANAGEMENT

#### Preparatory Assignments:

1. Read Chapter 1 of David's book, and Chapter 1 of Thompson and Strickland.
2. Read the STRAMA paper guidelines in the syllabus.
3. Find out whether your company has a strategic plan, and if so, how it is written.

#### Learning Objectives:

At the end of the session, learners are expected to:

1. Understand the course objectives, requirements, grading criteria, and rubrics for grading reports and mid-term exam;
2. Understand what the course is all about and the topics to be covered during the whole course;
3. Discuss what strategic management is all about and the strategic management process; and
4. Understand the contents and the requirements regarding the preparation, submission and oral defense of a Strategic Management paper.

#### Proposed Activities:

1. The facilitator and the learners will introduce themselves.
2. The facilitator will do the following:
  - a. Present the course objectives, course requirements, grading criteria, rubrics for grading reports and exams and classroom rules and decorum.
  - b. Lead the discussion on strategic management, the strategic management process and will ask students to share their experiences in strategic planning and strategic plan implementation.
  - c. Provide an overview of the specific topics to be covered under the course.
  - d. Divide the class into groups of 4 to 6 members each. These groupings will be followed for all the group assignments assigned in this course syllabus.
  - e. Discuss the outline and contents of the STRAMA paper, the three year time frame of the paper, the oral defense and deadlines for submission of the paper.
  - f. Provide guidelines in identifying and choosing the company which the learners can use as the subject of his or her STRAMA paper.
  - g. Discuss the assignments for the next session.

## SESSION 2

### MISSION/VISION STATEMENTS AND OBJECTIVES

#### Preparatory Assignments:

1. Read Chapters 2 & 5 (pages 165 – 167 only) of David, and Chapter 2 of Thompson & Strickland.
2. Research on your company's (or other companies) mission and vision statements and objectives and be prepared to discuss them in class in terms of:
  - How well they fit the definition of good mission and vision statements and objectives.
  - How well they are understood and appreciated by the employees of the company.
3. Prepare a PowerPoint presentation showing the analysis of your company's existing mission and vision statements and objectives. Include also your recommended revised mission and vision statements.
4. Submit a Background of the Company which you will use as a STRAMA topic.

#### Learning Objectives:

At the end of this session, learners are expected to:

1. Understand about the direction-setting tasks in strategic management;
2. Analyze mission and vision statements, their important components and criteria of good and well-written mission and vision statements, including the importance of having it strongly grounded on ethical principles and supportive of nation building and poverty alleviation particularly in less developed countries such as the Philippines; and
3. Identify the hierarchy of objectives and the characteristics of good strategic and financial objectives.

#### Proposed Activities:

1. The facilitator will introduce the topic and set the proper perspective by citing the importance of having clear mission and vision statements and objectives for any organization and by situating it in the whole strategic management process.
2. Learners will present in Power Point an analysis of their company's mission and vision statements. They will also be asked to specifically discuss whether the chosen company's mission and vision are rooted on ethical principles as well as how far the company has embraced its role in nation-building and poverty alleviation.
3. The facilitator will integrate the discussion and will provide additional examples if necessary.
4. Learners will present in Power Point an analysis of their company's strategic and financial objectives.
5. The facilitator will integrate the discussion with emphasis on the relationship of the vision with the strategic and financial objectives.
6. Learners will submit their individual assignments.
7. The facilitator will review the assignments for the next session.



## SESSION 3

### EXTERNAL AND INDUSTRY ASSESSMENT

#### Preparatory Assignments:

1. Read Chapter 3 of David, and Chapter 3 of Thompson & Strickland.
2. Read on recent trends and developments in the general external environment (e.g. economic, social, cultural, demographic, etc.) which may affect most industries and businesses by visiting the websites of government agencies like the NEDA, DTI, BSP, and NSO, among others.
3. Prepare a PowerPoint presentation of your company's external and industry analysis: Analysis of the Five Forces in your industry, External Factor Evaluation (EFE) matrix and a Competitive Profile Matrix (CPM). Present your conclusion about the industry's attractiveness and identify the external strategic issues.

#### Learning Objectives:

At the end of the session, learners are expected to:

1. Understand the framework and process involved in external and industry analysis, focusing on the analysis of the relevant external factors that significantly affect the prospects and attractiveness of a specific industry;
2. Conduct an in-depth industry and competitor analysis through the:
  - Identification of the trends and various forces driving an industry (e.g. market size, buyer composition and characteristics, industry pricing, growth and profitability, etc.)
  - Application of Michael Porter's Five Forces of Competitive Analysis.
  - Identification of an industry's critical success factors;
3. Identify the opportunities and threats in the external and industry environment;
4. Develop an External Factor Evaluation (EFE) Matrix;
5. Identify an industry's critical success factors and learn how to construct and use the Competitive Profile Matrix (CPM); and
6. Identify the critical strategic issues confronting an organization based on the key external factors.

#### Proposed Activities:

1. The facilitator will introduce the topic by reviewing the strategic management process and asking the students why they think an analysis of the external and industry environment is an important component of the whole process.
2. The facilitator will lead the class into the discussion of the approaches and concepts used in conducting external and industry analysis and give examples of how specific external developments may impact on an industry or a business.

3. Learners will present in Power Point their company's External Factor Evaluation (EFE) Matrix and Competitive Profile Matrix (CPM).
4. The facilitator will lead in the discussion and comments on the EFEs and CPMs presented.
5. The groups will submit their reports to the facilitator.
6. The facilitator will review the assignments for the next session.

## SESSION 4

### INTERNAL ASSESSMENT

#### **Preparatory Assignments:**

1. Read Chapter 4 of David, and Chapter 4 of Thompson & Strickland.
2. Prepare a PowerPoint presentation of your company's internal assessment: Financial Ratio Analysis, Internal Factor Evaluation (IFE) Matrix and an identification of internal strategic issues.

#### **Learning Objectives:**

At the end of the session learners, are expected to:

1. Assess a company's performance in terms of its functional areas and key performance indicators: market share, operations, revenues/sales, costs, profits, other financial measures, etc.;
2. Understand the framework and process involved in internal analysis;
3. Identify the strengths and weaknesses of a company;
4. Develop an Internal Factor Evaluation (IFE) matrix of a company; and
5. Identify the critical internal strategic issues confronting a company based on key internal factors.

#### **Proposed Activities:**

1. The facilitator will lead a class discussion on internal assessment based on the assigned readings and will supplement the discussion in the end by ensuring that all aspects of the topic are covered.
2. Learners will present in Power Point an analysis of their company's financial performance based on financial ratios and their company's Internal Factor Evaluation (IFE) Matrix.
3. The facilitator will lead the discussion and comment on the learners' output.
4. The learners will submit their reports and assignment to the facilitator.
5. The facilitator will review the assignments for the next session.

## SESSION 5

# STRATEGY CHOICES

### **Preparatory Assignments:**

1. Read Chapter 5 of David, and Chapters 5, 6, 7 & 8 of Thompson & Strickland.
2. Prepare an analysis of your company's current strategies (individual report) and be ready to make a presentation to the class.

### **Learning Objectives:**

At the end of the session, learners are expected to:

1. Understand the hierarchy of strategies;
2. Discuss David's strategy classification and definition: Intensive, Integration, Diversification and Defensive strategies;
3. Understand Michael Porter's generic strategies: Cost Leadership, Differentiation and Focus;
4. Identify the appropriate strategies for different industry and company situations as elucidated by Thompson and Strickland; and
5. Understand strategy development for non-profit and non-business oriented organizations.

### **Proposed Activities:**

1. The facilitator will give a short lecture on the hierarchy of strategies, basis of competitive advantage, David's classification of strategies, Porter's generic strategies, Thompson and Strickland's strategies for different industry and company situations and other competitive strategies.
2. Learners will present an analysis of their company's current strategies.
3. The facilitator will discuss how strategy development is done in non-profit organizations.
4. Learners will submit their individual assignments.
5. The facilitator will review the assignments for the next session.

## SESSION 6

# STRATEGY FORMULATION

### Preparatory Assignments:

1. Read Chapter 6 of David, and Chapter 6 of Thompson & Strickland.
2. Prepare PowerPoint presentations of your group's discussion results on the various strategy formulation matching tools: Strengths-Weaknesses-Opportunities-Threats (SWOT) Matrix, Strategic Position and Action Evaluation (SPACE) Matrix, Boston Consulting Group (BCG) Matrix, Internal-External (IE) Matrix, GE/McKinsey Matrix, Grand Strategy Matrix and decision tool: Quantitative Strategic Planning Matrix (QSPM).

### Learning Objectives:

At the end of the session, learners are expected to:

1. Apply the strategy formulation matching tools (SWOT, SPACE, BCG, IE , GE McKinsey, and Grand) and decision tool (QSPM) and how to apply them;
2. Analyze and use the results of these tools in formulating a company's strategic and financial objectives and strategies;
3. Formulate corporate and business level strategies as well as functional level strategies; and
4. Discuss the relative attractiveness of feasible alternative actions using Quantitative Strategic Planning Matrix (QSPM).

### Proposed Activities:

1. Groups will present the different strategy formulation tools they prepared. The class and the facilitator will give their comments.
2. The facilitator will lead the class discussion on how specific strategies are chosen for the different levels in an organization.
3. Groups will submit their reports on all the strategy formulation tools and decision tool.
4. The facilitator will review the assignments for the next session and assign the case to be analyzed by the different groups.

## SESSION 7

### CASE ANALYSIS EXERCISE

#### Preparatory Assignments:

1. Read Part 6 of the textbook – Strategic Management Case Analysis on pages 378 - 390.
2. Review all topics learned from Session 1 (Strategic Management Process) up to Session 6 (Strategy Formulation).
3. Review financial ratio analysis.
4. Groups will prepare a report on the assigned written case analysis. Groups will recommend strategies for the company for the next three (3) years.

#### Learning Objectives:

At the end of the session, learners are expected to apply the strategic management concepts and tools learned from Sessions 1 to 6:

1. Draft a well-written and good mission and vision statements for a company;
2. Identify strategic and financial objectives of a company;
3. Identify the opportunities and threats for a company, analyze their degree of importance by assigning appropriate weights, and evaluating the company's response through the construction of the EFE matrix;
4. Analyze the strengths and weaknesses of a company and evaluate their degree of importance and reflect these in an IFE matrix; and
5. Formulate objectives and strategies for a company using the strategy formulation tools learned in the previous sessions.

#### Proposed Activities:

1. Each of the groups will present their case analysis and recommended strategies.
2. The facilitator will discuss with the whole class the important strategic issues as well as the solution to the assigned case.
3. If time permits, the facilitator will give a short lecture on financial ratio analysis.
4. Learners will submit their group reports.
5. The facilitator will review the assignments for the next session.

**SESSION 8**  
**MID-TERM EXAM**

**Preparatory Assignments:**

1. Review Part 6 of the textbook – Strategic Management Case Analysis on pages 378 - 390.
2. Review all topics learned from Session 1 (Strategic Management Process) up to Session 6 (Strategy Formulation).
3. Bring textbook, pad papers, pen or pencil, highlighters, calculator, laptops, etc., as required by the STRAMA professor.

**Objective:**

To assess how much the learners have understood and learned the lessons from Sessions 1 to 7.

**Proposed Activities:**

1. The mid-term exam may be given in the classroom; or taken online and submitted through Blackboard or emailed directly to the Professor.
2. Learners will do a STRAMA case analysis for the whole session. (Note: The session may be extended by one hour by the Professor.)
3. Learners will be tasked to recommend strategies for the selected company.

## SESSION 9

# STRATEGY IMPLEMENTATION AND STRATEGY EVALUATION AND CONTROL

### Preparatory Assignments:

1. Read Chapters 7, 8 & 9 of David, and Chapters 9, 10 & 11 of Thompson & Strickland.
2. Read the Article on the Balanced Scorecard by Norton and Kaplan that is included in the syllabus.
3. Prepare the following for your company: a strategy map, action plans for one of your major strategies and a balanced scorecard.

### Learning Objectives:

At the end of the session, learners are expected to:

1. Understand the results and discussion of the mid-term exam;
2. Develop a strategy map;
3. Appreciate the importance of management and functional issues in strategy implementation;
4. Understand the steps and components involved in action or departmental planning;
5. Understand the strategy evaluation framework and the characteristics of an effective strategy evaluation system;
6. Develop a balanced scorecard; and
7. Discuss performance measurement as an important component of strategy evaluation.

### Proposed Activities:

1. The facilitator will return the mid-term exam papers to the students and discuss the results.
2. The facilitator will lead the discussion on the development of a strategy map and a balanced scorecard for a company.
3. The facilitator will discuss the various elements for successful strategy implementation, including action/departmental planning, resource allocation and alignment of the organization's structure to strategies.
4. Learners will present their company's strategy map and balanced scorecard, and action/departmental plans.



5. The facilitator will give comments and inputs and provide an integration.
6. Learners will submit their individual reports.
7. The facilitator will review the assignments for the next session. Groups will be assigned one (1) strategic management topic each.

## SESSION 10

### OTHER STRATEGIC MANAGEMENT TOPICS

#### Preparatory Assignments:

1. Read Chapters 10 & 11 of David.
2. Research and review materials on the following topics:
  - ❑ Business Ethics
  - ❑ Social Responsibility
  - ❑ Environmental Sustainability
  - ❑ Economic Value Added (EVA)
  - ❑ Market Value Added (MVA)
  - ❑ Strategic issues in a global environment
  - ❑ Other topics that the Professor may want to assign
3. Groups will be assigned to make a presentation on any of the above topics.

#### Learning Objectives:

At the end of the session, learners are expected to understand the following strategic management topics:

- Economic Value Added (EVA)
- Market Value Added (MVA)
- Strategic issues in a global environment
- Business Ethics
- Social Responsibility
- Environmental Sustainability

#### Proposed Activities:

1. Groups will present their assigned topic.
2. Groups will submit their reports.
3. The facilitator will review the assignments for Session 14.

**SESSIONS 11 AND 12**  
**RESEARCH FOR THE STRAMA PAPER**

**Proposed Activities:**

1. Learners will be given free time to do research and work on their individual STRAMA papers.
2. Learners will prepare their Power Point presentation for a mock defense to be conducted in Session 14.

## SESSION 13

### MOCK DEFENSE OF THE STRATEGY PAPER

#### Preparatory Assignments:

1. Learners will prepare for a mock oral defense of their individual strategy paper, highlighting the following:
  - Company Background
  - Vision/Mission
  - CPM
  - EFE Matrix
  - IFE Matrix
  - Conclusion and Summary of Strategic Issues
  - Objectives
  - Strategy Recommendations
2. Learners will submit a draft of their STRAMA paper's External Analysis, Internal Analysis, and Objectives & Strategy Recommendations.

#### Learning Objectives:

At the end of the session, learners are expected to:

1. Understand how a strategy paper oral defense is conducted; and
2. Incorporate improvements in his/her strategy paper.

#### Proposed Activities:

1. The facilitator will assign some learners as panel members and some as defenders.
2. Assigned defenders will be made to present and defend before a panel their strategy paper.
3. The class and the facilitator will give their comments and suggestions to improve the presentation and the oral defense.
4. The learners will submit their drafts of their STRAMA paper External Analysis, Internal Analysis, Objectives and Strategy Recommendations.

## SESSION 14 & 15

# FINANCIAL PROJECTIONS, COURSE INTEGRATION AND CONSULTATION

### Learning Objectives:

At the end of the session, the learners are expected to:

1. Evaluate the financial implications of strategies and incorporate these in their financial projections; and
2. Integrate all their learnings in the STRAMA course and use these in formulating and writing a good Strategic Management Paper for the company or organization of their choice.

### Proposed Activities:

1. The facilitator will give a short lecture on the how to integrate the financial implications of their major strategies on their financial projections.
2. The facilitator will present an integrated summary of what was covered in the course, and give additional guidelines and pointers on the development and writing of the learners' STRAMA papers.
3. The facilitator will set the deadline for the STRAMA paper based on the guidelines, and give additional guidelines for the oral defense, if needed.
4. The facilitator will be available for group or individual consultation.

## APPENDIX A

# Strama Paper Evaluation Sheet

(AGSB Strama Form 3/7/2014)

THIS EVALUATION SHEET FOR PANEL MEMBERS		DATE SUBMITTED
PAPER TITLE		
STUDENT NAME		
DEFENSE SCHEDULE	DATE	DAY TIME
PANEL MEMBERS	PANEL CHAIRPERSON	
	PANEL MEMBER	
	PANEL MEMBER	

GRADE FOR WRITTEN DOCUMENT					
BASIS	RAW GRADE	WEIGHT	WEIGHTED GRADE	WEIGHT	WEIGHTED GRADE
<b>COMPLETENESS AND TECHNICAL CORRECTNESS</b> The degree to which the prescribed content requirements of the paper have been met and STRAMA concepts, theories and tools have been correctly applied. <b>Use detailed criteria below:</b>		100%	0.00	40%	0.00
<b>A. COMPANY BACKGROUND and RESEARCH METHODOLOGY</b>		5%	0.00		
<b>B. VISION/MISSION ANALYSIS</b>		5%	0.00		
<b>C. EXTERNAL ANALYSIS</b> Data support/analysis of relevant external factors; Industry Analysis: Porter's 5 forces; Competitive Profile Matrix (CPM); External Factor Evaluation (EFE) Matrix; Conclusion/Strategic Issues		20%	0.00		
<b>D. INTERNAL ANALYSIS</b> Company's financial performance; Functional Audit; Internal Factor Evaluation (IFE) Matrix; Conclusion/Strategic Issues		20%	0.00		
<b>E. STRATEGY FORMULATION TOOLS</b> SWOT; BCG Matrix (if relevant); SPACE, IE Matrix; GE McKinsey; GRAND; QSPM		20%	0.00		
<b>F. OBJECTIVES AND STRATEGIES</b> Financial and Strategic Objectives; Strategy Recommendations; Financial Projections		20%	0.00		
<b>G. ACTION PLANS</b>		5%	0.00		
<b>H. STRATEGY MAP AND BALANCED SCORECARD</b>		5%	0.00		
<b>CRITICAL THINKING</b> The ability to use and integrate information and ideas, carry out a rational and in-depth analysis, identify key strategic management issues and produce substantive, creative, logical and well-thought out strategy <b>recommendations.</b>				40%	0.00
<b>ORGANIZATION/WRITING SKILLS</b> The degree to which topics have been logically sequenced within chapters and sections as well as to grammar, spelling, language used, formats of tables and figures and the overall written <b>communication skill.</b>				20%	0.00
<b>OVERALL WRITTEN DOCUMENT GRADE</b>					<b>0.00</b>

COMMENTS

GRADE FOR ORAL DEFENSE	
<b>ORAL DEFENSE GRADE</b> The degree to which mastery of the subject is demonstrated through: Presentation of the summary, Handling of questions, and Presentation/Communication skills.	
EVALUATED BY (Name, Sign, Date)	<b>Submit accomplished form to the Panel Chairperson on the day of the defense.</b>

**APPENDIX B**

## Strama Paper Evaluation Summary Sheet

(AGSB Strama Form 2/7/2014)

PAPER TITLE				DATE SUBMITTED
STUDENT NAME				
DEFENSE SCHEDULE	DATE	DAY	TIME	
PANEL MEMBERS	PANEL CHAIRPERSON			
	PANEL MEMBER			
	PANEL MEMBER			
<b>GRADE</b>				
BASIS	RAW GRADE	WEIGHT	WEIGHTED GRADE	DECISION
WRITTEN DOCUMENT				<input type="checkbox"/> PASS <input type="checkbox"/> PASS WITH REVISIONS <input type="checkbox"/> RE-ORAL <input type="checkbox"/> FAIL
DEDUCTION FOR LATE SUBMISSION				
WRITTEN DOCUMENT FINAL GRADE		70%		
ORAL DEFENSE		30%		
TOTAL		100%		
COMMENTS				

<b>SIGNATURES</b>	
STUDENT (Name, Sign, Date)	PANEL CHAIRPERSON (Name, Sign, Date)
PANEL MEMBER (Name, Sign, Date)	PANEL MEMBER (Name, Sign, Date)

COPY DISTRIBUTION: Panel Chairperson, Office of the Asst. Dean, Registrar, Student

**APPENDIX C**

# Strama Paper Data Sheet

(Strama Form 1 6/2014)

NAME (Last, First, Middle)	STUDENT ID
----------------------------	------------

AGSB PROGRAM (check one)

**MBA-Standard**   
  **Ateneo-Regis**   
  **Middle Managers**   
  **MBAH**   
  Specify >>>>>>>>>

AGSB PROGRAM SITE (Check one)

**Rockwell**   
  **Cebu**   
  **Clark**   
  **Iloilo**   
  **Lipa**   
  **Sta Rosa**  
 **Sto Tomas**   
 Specify >>>>>>>>>

STRAMA TITLE (Full name of entity)

---

THE STRAMA PAPER IS TO BE HANDLED AS **CONFIDENTIAL** (Check one)

**No**   
 **Yes, because: >>**

SCOPE OF OPERATIONS (Check one. This refers to the geographic location of the company's operations and the location of the customer markets the company serves.)

**Dom Only** (Domestic Operations Only)   
 **Intl Only** (International Operations Only)   
 **Both**

PUBLICLY LISTED (Check one. This refers to companies that have issued securities via an Initial Public Offering.)

**Yes**   
 **No**

INDUSTRY (Check only one that best describes the entity.)

<input type="checkbox"/> <b>Agri/Fish</b> (Agriculture, Forestry, Fishing)	<input type="checkbox"/> <b>Mining</b> (Mining, Quarrying)	<input type="checkbox"/> <b>Mftg</b> (Manufacturing)
<input type="checkbox"/> <b>Elec</b> (Electricity, Gas, Steam, A/C Supply)	<input type="checkbox"/> <b>Water</b> (Water, Sewerage, Waste Mgmt)	<input type="checkbox"/> <b>Const</b> (Construction)
<input type="checkbox"/> <b>Trade</b> (Wholesale and Retail Trade)	<input type="checkbox"/> <b>Trans/Stor</b> (Transportation, Storage)	<input type="checkbox"/> <b>Hospitality</b> (Hotels, Restaurants)
<input type="checkbox"/> <b>Info/Com</b> (Info, Communications)	<input type="checkbox"/> <b>Finance</b> (Financial, Insurance)	<input type="checkbox"/> <b>Property</b> (Real Estate)
<input type="checkbox"/> <b>Prof/Tech</b> (Professional, Technical)	<input type="checkbox"/> <b>Admin</b> (Admin, Support Services)	<input type="checkbox"/> <b>Public</b> (Public Admin, Defense, SSS/GSIS)
<input type="checkbox"/> <b>Educ</b> (Education)	<input type="checkbox"/> <b>Health/Soc</b> (Health, Social Work)	<input type="checkbox"/> <b>Art/Rec</b> (Art, Entertainment, Recreation)
<input type="checkbox"/> <b>Other Serv</b> (Other Services)	<input type="checkbox"/> <b>Household</b> (Household Employers)	<input type="checkbox"/> <b>WorldOrg</b> (Extraterritorial Organizations)

TYPE OF BUSINESS ENTITY (Check only one that best describes the entity.)

**Single** (Sole Proprietorship)   
 **Partner** (Partnership)   
 **Corp** (Private Corporation)  
 **Govt** (Government Corporation)   
 **Coop** (Cooperative)

CORE BUSINESS/PRIMARY VALUE STREAM (Check only one that best describes the entity. This refers to the main activity and main revenue source of the company.)

**Mftg** (Manufacturing)   
 **Mktg** (Marketing)   
 **Dist** (Sales and Distribution)  
 **Svcs** (Services)   
 **Buy** (Purchasing/Procurement)   
 **Adv** (Advertising)  
 **R&D** (Research & Development)

SIGN OFF	
PREPARED BY (Name, Sign, Date)	CHECK FOR CONFIRMATION  <input type="checkbox"/> <b>I confirm my Strama paper is in pdf format compiled in one file</b>

FOR AGSB USE ONLY				
GRADUATION YEAR	STRAMA GRADE	EXCLUDED (Check one) <input type="checkbox"/> <b>Code 0</b> - Included <input type="checkbox"/> <b>Code 1</b> - Excluded	INPUTTED TO SMDb BY (Sign/Date)	UPLOADED TO SMPapers BY (Sign/Date)