

Ateneo Graduate School of Business  
Rockwell Center, Makati City

# **STRATEGIC MANAGEMENT**

Ateneo-Regis MBA Program

Revised: January 2015

CENTRAL MANAGEMENT CLUSTER  
Ateneo Graduate School of Business  
Ateneo-Regis MBA 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 to develop and implement cross-functional decisions towards the attainment of their organizations' vision, mission and objectives using strategic management principles and integrating knowledge and skills learned 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 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	TOPICS	READINGS/ASSIGNMENTS
1	<p>Course requirements The STRAMA Paper: Outline and Guidelines Vision/Mission/Objectives Strategy Choices</p> <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> <p>Strategy development for non-profit, non-business oriented organizations</p>	<p>David, Chapters 2 &amp; 5 Thompson and Strickland, Chapters 2, 5, 6, &amp; 7</p> <p><b>Individual assignment:</b></p> <ol style="list-style-type: none"> <li>1) Read the STRAMA Paper Guidelines in this syllabus.</li> <li>2) Submit the Company Background for your proposed STRAMA paper topic.</li> <li>3) Submit an analysis of the company's mission &amp; vision statements &amp; objectives. Recommend revised mission &amp; vision statements.</li> </ol>
2	<p>External &amp; Industry Analysis</p> <ul style="list-style-type: none"> <li>• General environment</li> <li>• Industry/Competitive environment</li> <li>• Identifying industry's dominant features</li> <li>• Porter's Five Forces of Competitive Analysis</li> <li>• Analytical Tools: EFE matrix &amp; CPM</li> </ul>	<p>David, Chapter 3 Thompson and Strickland, Chapter 3</p> <p><b>Individual assignment:</b></p> <ol style="list-style-type: none"> <li>1. Prepare an Industry Analysis for your business using Porter's Five Forces framework</li> <li>2. Prepare EFE &amp; CPM matrices for your company.</li> <li>3. Based on your external analysis, prepare the following:             <ol style="list-style-type: none"> <li>a) Conclusion about your industry attractiveness</li> <li>b) Strategic issues facing your company</li> </ol> </li> </ol>
3	<p>Internal Analysis</p> <ul style="list-style-type: none"> <li>• Assessment of company performance</li> <li>• David's audit list (Management &amp; business functions framework)</li> <li>• Other frameworks for organizational and internal analysis</li> <li>• Analytical tool: IFE matrix</li> </ul>	<p>David, Chapters 4 Thompson &amp; Strickland, Chapters 4</p> <p><b>Individual assignment:</b></p> <p>Prepare the following for your company:</p> <ol style="list-style-type: none"> <li>1) Financial analysis</li> <li>2) IFE matrix</li> <li>3) Analysis of the current strategies</li> <li>4) Strategic Issues</li> </ol>

4	<p>Strategy Analysis and Formulation Tools</p> <ul style="list-style-type: none"> <li>• SWOT matrix</li> <li>• SPACE matrix</li> <li>• BCG matrix</li> <li>• IE matrix</li> <li>• GE-McKinsey Matrix</li> <li>• Grand Strategy matrix</li> </ul> <p>Strategy Decision Tool</p> <ul style="list-style-type: none"> <li>• QSPM</li> </ul> <p>Strategy Evaluation</p>	<p>David, Chapter 6</p> <p><b>Group assignment:</b></p> <p>Prepare the following for a specific company of your choice:</p> <ol style="list-style-type: none"> <li>1) EFE &amp; IFE Matrices</li> <li>2) Matrices on SWOT, SPACE, BCG, IE, GE McKinsey, Grand &amp; QSPM.</li> <li>3) A critical and integrated analysis of the results of your matrices</li> <li>4) Financial &amp; Strategic Objectives</li> <li>5) Strategy recommendations</li> </ol>
5	<p>Mid-term Exam - Case analysis</p> <p>The mid-term exam may be given in the classroom; or taken online and submitted through Blackboard or emailed directly to the Professor.</p>	<p>Review all topics covered from Sessions 1 to 4</p>
6	<p>Discussion on Mid-Term Exam (solution &amp; results)</p> <p>Strategy Mapping and the Balanced Scorecard</p> <p>Strategy Implementation</p> <ul style="list-style-type: none"> <li>• Prerequisites to effective strategy implementation</li> <li>• Action/Departmental planning</li> <li>• Strategic leadership</li> <li>• Other managerial components in strategy implementation</li> </ul> <p>Strategy Evaluation &amp; Control</p> <ul style="list-style-type: none"> <li>• Performance Measurement &amp; Monitoring</li> </ul>	<p>F. David, Chapters 7, 8, &amp; 9 A. Thompson &amp; A. Strickland, Chapters 9, 10 &amp; 11 Article on the Balanced Scorecard by Norton and Kaplan (Attached in the syllabus).</p> <p><b>Individual assignment:</b></p> <p>Prepare the following for your company:</p> <ol style="list-style-type: none"> <li>1) Company objectives</li> <li>2) A Strategy Map and Specific Strategy Recommendations</li> <li>3) Departmental Plans</li> <li>4) Balanced Scorecard.</li> </ol>
7	<p>Financial Projections and Financial Impact of Strategies</p> <p>Other strategic management topics:</p> <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> <li>• Other topics that the Professor may assign</li> </ul>	<p>David, Chapters 10 &amp; 11 Supplemental Materials that may be provided by the Professor</p> <p><b>Group assignment:</b></p> <p>Present and submit a group report on one of the special topics assigned. (The Professor may assign different topics for the different groups.)</p>
8	<p>Course integration/Consultation</p>	

## 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:

*Strategic Management*  
*Ateneo Regis MBA Program*  
*January 2015*

<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 four (4) hours excluding a 30-minute break. Although attendance per se is not given a grade equivalent, it will have a bearing on the student'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 absence is one (1), beyond which the student will receive a "FAIL" grade. Habitual tardiness will be recorded. Tardiness exceeding 30 minutes in a session 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 and are appropriate, easy to understand and attractive?</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 understand, and attractive.

## 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 projected cash flow statements, income statements and balance sheets for the plan period are pre-requisites for the Strama paper. Strama papers that do not have financial projections will not be accepted and will not be scheduled for defense. It is advisable to place a tab on the written document to indicate the pages where the financial projections are located. The AGSB staff-in-charge for accepting the Strama papers will check if the Strama papers include financial projections.**

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 50 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 revenue 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 60	First deadline for the submission of STRAMA papers for Regis classes. 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 61 until Day 90 will get a deduction of 0.5 in their grade on the STRAMA paper.
Day 90	Second and final deadline for the submission of STRAMA papers for Regis classes. Learners will be scheduled for defense within a maximum of 60 days from Day 90. Learners unable to submit 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.
Day 150	Final deadline for oral defense and submission of grades of learners who submitted their STRAMA papers on Day 90. 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

### INTRODUCTION COMPANY VISION AND MISSION

#### Preparatory Assignments:

1. Read Chapters 2 & 5 of the textbook, and Chapters 2, 5, 6 & 7 of Thompson and Strickland's book.
2. Prepare a Company Background for your proposed STRAMA paper topic.
3. Prepare an analysis of your proposed company's vision & mission statements and objectives based on David's criteria and framework. As a result of your analysis, recommend revised vision & mission statements if necessary.

If your company has no existing vision & mission and objectives statements, interview the owners or top management to get information on what they believe to be their definition of the business mission, vision and objectives. Formulate vision & mission statements for the company on the basis of their replies and following David's criteria.

#### Learning Objectives:

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

1. Understand the direction-setting tasks in strategic management – definition, characteristics, components and criteria of good mission and vision statements and strategic and financial objectives;
2. Discuss the importance of a complete and well written mission statement, including the value of incorporating a concern for nation building as a key component of a mission statement;
3. Understand the various types of strategies and the hierarchy of strategies;
4. Discuss the importance and basis of competitive advantage;
5. Distinguished strategy choices as classified by David: Intensive, Integration, Diversification and Defensive strategies;
6. Understand Michael Porter's generic strategies: Cost Leadership, Focus and Differentiation;
7. Discuss the appropriate strategies for different industry and company situations as elucidated by Thompson and Strickland; and
8. Discuss about strategy development for non-profit or non-business oriented organizations.

#### Proposed Activities:

1. The facilitator and learners will introduce themselves.
2. The facilitator will clarify the course requirements and the Strama Paper guidelines.

3. Learners will be asked to discuss their ideas of good and well-written mission and vision statements and company objectives through a class presentation. The facilitator will underscore the value of including “concern for nation building” in a company’s mission statement by showing examples.
4. The facilitator will integrate the discussion by highlighting the direction-setting tasks of developing a strategic vision and establishing strategic objectives as rudiments to formulating a strategic plan.
5. The facilitator will give a lecture on the hierarchy of strategies, basis of competitive advantage, Porter’s generic strategies, strategies based on David’s classification, and other types of strategies.
6. The facilitator will lead a class discussion on strategy development in non-profit or non-business oriented organizations based on the experiences of learners.
7. Learners will submit their individual assignments.
8. The facilitator will collect all individual assignments and reports and remind learners of the assignments for the next session.

## SESSION 2

### EXTERNAL & INDUSTRY ANALYSIS

#### Preparatory Assignments:

1. Read Chapter 3 of the textbook 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 an industry analysis for your business based on Porter's Five Forces Framework.
4. Prepare EFE and CPM Matrices for your company. Based on your external and industry analysis, make a conclusion about your industry attractiveness and identify the external strategic issues facing the company.

#### Learning Objectives:

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

1. Apply the framework and process involved in external and industry analysis, focusing in particular on the analysis of 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, profitability, etc.).
  - Application of Michael Porter's Five-Forces of Competitive Analysis model.
  - Identification of an industry's critical success factors and using the factors in a competitor analysis framework.
3. Identify the opportunities and threats in the external and industry environment.

#### Proposed Activities:

1. The facilitator will introduce the topic by reviewing the strategic management process and asking the learners why they think an analysis of the external environment is an important component of the whole process.
2. The facilitator will lead the class in the discussion of the approaches and concepts used in conducting external and industry analysis and give examples of how specific external developments may impact an industry or a business.
3. Learners will present their external, industry and internal analysis summarized in the analysis of the Five Forces of Competition, External Factor Evaluation (EFE) matrix, and Competitive Profile Matrix (CPM). Learners will also discuss their conclusions about their

industry and the strategic issues facing their company. The class and the facilitator will give their comments and suggestions for improvement.

4. Learners will submit their individual assignments and reports.
5. The facilitator will review the assignments for the next session.

## SESSION 3

### INTERNAL ANALYSIS

#### **Preparatory Assignments:**

1. Read Chapter 4 of David, and Chapter 4 of Thompson & Strickland.
2. Prepare the following for a company:
  - Financial analysis
  - IFE matrix
  - Analysis of the current strategies
  - Identification of internal strategic issues

#### **Learning Objectives:**

At the end of the session the 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. Apply 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, as well as the identified strategic issues facing the company.
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 4

### STRATEGY ANALYSIS AND STRATEGY FORMULATION TOOLS

#### Preparatory Assignments:

1. Read Chapter 6 of the textbook.
2. For each group, prepare the following for a specific company of your choice:
  - EFE & IFE Matrices
  - Matrices on SWOT, SPACE, BCG, IE, GE-McKinsey, GRAND & QSPM
  - A critical and integrated analysis of the results of your matrices
  - Financial & Strategic Objectives
  - Strategy Recommendations

#### Learning Objectives:

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

1. Apply the various strategy formulation tools: SWOT, SPACE, BCG, IE, GE-McKinsey, and Grand and the strategy decision tool: QSPM;
2. Analyze and use the results of these tools in formulating a company's strategic and financial objectives and strategies; and
3. Evaluate strategy choices and come up with specific strategy recommendations based on a company's strategic and financial objectives, and the analysis of the external and internal environment.

#### Proposed Activities:

1. Each group will present the different strategy formulation tools and decision tool they developed, as well as their objectives and strategy recommendations based on their results and analysis. If there are many groups, the facilitator will manage the presentations by assigning groups to present the different matrices. The facilitator and the class will give their comments.
2. Groups will submit their reports.
5. The facilitator will review the assignments for the next session.

**SESSION 5**  
**MID-TERM EXAM**

**Preparatory Assignments:**

1. Review Part 6 of the textbook – Strategic Management Case Analysis on pages 389 - 399.
2. Review all topics learned from Session 1 to Session 4.
3. Bring textbook, pad papers, pen or pencil, highlighters, calculator, laptops, etc., as required by the STRAMA professor.

**Objective:**

Through this mid-term case analysis exercise, the learners will be able to assess their learning on topics covered in Sessions 1 to 4.

**Proposed Activities:**

Learners will be asked to analyze a case to be assigned by the Facilitator, applying the strategic management process, concepts and tools learned from Sessions 1 to 4.

## SESSION 6

### STRATEGY MAPPING, STRATEGY IMPLEMENTATION, AND STRATEGY EVALUATION & CONTROL

#### Preparatory Assignments:

1. Read Chapters 7, 8 & 9 of the textbook, and Chapters 9, 10, & 11 of Thompson & Strickland.
2. Read the article on the Balanced Scorecard by Norton and Kaplan (Attached in the syllabus.)
3. Prepare the following for your company:
  - Company Objectives
  - A Strategy Map and Specific Strategy Recommendations
  - Departmental Plans
  - Balanced Scorecard

#### Learning Objectives:

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

1. Learn from the results and discussion of the mid-term exam;
2. Develop a strategy map and a balanced scorecard;
3. Appreciate the importance of management and functional issues in strategy implementation;
4. Identify 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; and
6. Understand 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 7

### FINANCIAL PROJECTIONS AND 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
  - Value Chain Analysis
  - Economic Value Added (EVA)
  - Market Value Added (MVA)
  - Strategic issues in a global environment
  - Other topics that the Professor may include
3. Each of the 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:

1. Assess the financial implications of their strategies, and how to incorporate these in the company's financial projections.
2. Understand the following strategic management topics:
  - Value Chain Analysis
  - Economic Value Added (EVA)
  - Market Value Added (MVA)
  - Strategic issues in a global environment
  - Business Ethics
  - Social Responsibility
  - Environmental Sustainability

#### Proposed Activities:

1. The facilitator will give a brief lecture on how to take into account the financial impact of major strategies and how to incorporate these into the financial projections.
2. Each of the groups will be asked to present their assigned topic. The facilitator will lead the class in discussing the topics.
3. The groups will be asked to submit their reports.

## SESSION 8

### COURSE INTEGRATION/CONSULTATION

#### **Preparatory Assignment:**

The learners should integrate their work so far on their respective STRAMA papers based on previous assignments and inputs of the facilitator and be prepared to consult with their facilitator on any specific concerns and clarifications that they may have regarding their STRAMA papers.

#### **Learning Objectives:**

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

1. Appreciate the value and importance of Strategic Management in enabling an organization to maximize its potential and performance towards the attainment of its vision and mission;
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;
3. Learn how to present a Strategy Paper during an oral defense; and
4. Consult with the facilitator about his/her individual concerns on his/her strategy paper.

#### **Proposed Activities:**

1. The facilitator will give an integrative summary of Strategic Management and additional guidelines for the STRAMA paper.
2. The facilitator will give learners pointers on how to effectively present a Strategy Paper, and give other guidelines for the oral defense.
3. The facilitator will be available for individual consultation with the learners regarding their STRAMA paper.

## APPENDIX A

# Strama Paper Evaluation Sheet

(AGSB Strama Form 3/7/2014)

THIS EVALUATION SHEET FOR PANEL MEMBERS						
PAPER TITLE					DATE SUBMITTED	
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>	0.00	100%	0.00	40%	0.00	
<b>A. COMPANY BACKGROUND and RESEARCH METHODOLOGY</b>	0.00	5%	0.00			
<b>B. VISION/MISSION ANALYSIS</b>	0.00	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	0.00	20%	0.00			
<b>D. INTERNAL ANALYSIS</b> Company's financial performance; Functional Audit; Internal Factor Evaluation (IFE) Matrix; Conclusion/Strategic Issues	0.00	20%	0.00			
<b>E. STRATEGY FORMULATION TOOLS</b> SWOT; BCG Matrix (if relevant); SPACE; IE Matrix; GE McKinsey; GRAND; QSPM	0.00	20%	0.00			
<b>F. OBJECTIVES AND STRATEGIES</b> Financial and Strategic Objectives; Strategy Recommendations; Financial Projections	0.00	20%	0.00			
<b>G. ACTION PLANS</b>	0.00	5%	0.00			
<b>H. STRATEGY MAP AND BALANCED SCORECARD</b>	0.00	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>	0.00			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 communication skill.	0.00			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)	Submit accomplished form to the Panel Chairperson on the day of the defense.

**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)

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## APPENDIX C

# Strama Paper Data Sheet

(Strama Form 1 6/2014)

NAME (Last, First, Middle)	STUDENT ID
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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)