

**Course Syllabus**  
**BUSMHR 7223: Fall 1, 2016**  
**Strategy Implementation**  
**MON and WED 10:15-11:45 am; 315 Gerlach Hall**  
**Fisher College of Business**  
**Ohio State University**

**Instructor:** Dr. Tony Rucci  
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**Office hours:** M & W noon - 1:30 am  
Also by appointment

**Course Description**

This course will have a decided ‘practical applications’ bias. The course will view the subject of strategy development, implementation and execution *from the enterprise leader’s perspective*. Many of the long-time gurus in the area of “strategy” (e.g. Gary Hamel, Ram Charan, Kaplan & Norton, Simons) have more recently emphasized the importance of good *execution* of strategy. In fact, many have suggested that the best intellectual strategy will fail if not executed effectively. This course will consider the elements of good strategy, but will focus primarily on what it takes to ensure organizational clarity, alignment, implementation and execution of strategic priorities. The important role of organizational culture, leadership, communications, compensation and metrics will be evaluated relative to effective execution of strategy. ***Once you have completed this course, you should be equipped with a “tool box” of methods that would enable you to lead a strategic planning effort in any organization, at any level.***

**Course Objectives**

The objectives of this course are to create a classroom experience and provide readings and assignments that allow each student:

1. To understand and appreciate both academic literature as well as the practical application of good strategy development and execution.
2. To identify those critical factors that need to be addressed when attempting to align complex organizations behind stated strategy.
3. To determine the organizational practices and efforts that must be in place in order to enable successful execution of strategy.
4. To closely evaluate the practical application of the three stages of strategy: I. Clarity; II. Alignment; III. Execution.
5. To learn from the experiences of CEO guest speakers, who will discuss their organization’s approach and outcomes with strategic planning and execution.

## **Course Schedule and Reading List**

### **Week 1**

**WED 8-23**                      **Course Overview: The basic building blocks of good strategy and strategy execution**  
1.Reading: "What really works", HBR, 2003 (#R0307C)  
**Mid-term assignment and prospectus will be discussed in class**

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### **Week 2**

**MON 8-28**                      **Clarity I. Business Models, Blue Skies and Core purpose**  
2.Reading: "Why business models matter", Magretta, HBR 2002, (#9985)  
3.Reading: "M&A: the one thing you need to get right", Martin, HBR 2016 (#R1606B)  
Book: chapter 2 in Simons: "How do your core values prioritize shareholders, employees and customers?"

**WED 8-30**                      **Clarity II. Who's the customer?**  
4.Reading: "Understanding customer experience", Meyer & Schwager, HBR 2007 (#R0702G)  
5.Reading: "The one number you need to grow", Reicheld, HBR 2003 (#5534)  
Book: chapter 1 in Simons: "Who is your primary customer ?"

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### **Week 3**

**MON 9-5**                      **OSU CLOSED/LABOR DAY**

**WED 9-7**                      **Clarity III: Who's the competition? Who are we (SWOT)?**  
6.Case: "eHarmony", HBS Case, 2008 (#9-709-424)  
Book: chapter 7 in Simons: "What strategic uncertainties keep you awake at night?"

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### **Week 4**

**MON 9-12**                      **Alignment I: Communicating: The importance of setting clear, simple strategic priorities**  
7.Case: "Four Seasons goes to Paris: 53 properties, 24 countries, 1 philosophy", HBS Case, 2003 (#803069)  
Book: chapter 4 in Simons: "What strategic boundaries have you set?"

**WED 9-14**                      **GUEST SPEAKER: Mr. Chuck Gehring, CEO, Life Care Alliance**  
**Mid-term papers due at start of class**

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### **Week 5**

**MON 9-19**                      **Alignment II: Strategic metrics: The Balanced Scorecard**  
8.Reading: "Having trouble with your strategy? Then map it", Kaplan & Norton, HBR 2000 (#5165)  
9.Reading: "The balanced scorecard: measures that drive performance", Kaplan & Norton, HBR 2005 (#4096)  
10.Reading: "Coming up short on non-financial performance measurement", Ittner & Larckner, HBR 2003 (#5380)  
Book: chapter 3 in Simons: "What critical performance variables are you tracking?"

**WED 9-21**                      **GUEST SPEAKER: Ms. Rachel Lustig, CEO, Catholic Social Services**

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## Week 6

**MON 9-26**

### **Execution I: Culture and Innovation**

- 11. Case: "Citibank: Performance evaluation", HBS Case (#9-198-048)
- 12. Reading: "How innovative is your company's culture?" Rao & Weintraub, Sloan Management Review, 2013 (#SMR444)
- Book: chapter 5 in Simons: "How are you generating creative tension?"

**WED 9-28**

### **Execution II: Social Operating Mechanisms & Organizational Capabilities**

- 13. Reading: "The secrets to successful strategy execution", Neilson, Martin & Powers, HBR 2008 (#R0806C)
- 14. Reading: "Capitalizing on capabilities", Ulrich & Smallwood, HBR 2004 (#7014)
- Book: chapter 6 in Simons: "How committed are your employees to helping each other

**Final paper assignment and prospectus will be discussed in class; case will be announced**

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## Week 7

**MON 10-3**

**GUEST SPEAKER: Mr. Jim Negron, President, Corna Construction**

**WED 10-5**

**GUEST SPEAKER: Ms. Mary Lynne Foster, CEO, Children's Hunger Alliance**

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## Week 8

**MON 10/10**

### **Execution III: Leadership & course wrap up**

- 15. Case: "Strategic planning at Sun Life", HBS Case, 2001 (#301084)
- 16. Reading: "Why strategy execution unravels-and what to do about it", Sull et al, HBR 2015 (#R1503C)

**Final papers due at start of class**

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## **Books and Readings Required for the Course**

**Book: "Execution: Seven strategy questions."** Robert Simons, HBR Press, 2010

**Course Packet:** Available electronically through the Harvard Press course packet site. Contains all articles and cases listed in the course syllabus reading list above, except those which will be handed out in class/posted onto the Carmen course site. All HBR *articles* listed above are also available through the OSU library. HBR *cases are NOT available through the library*, since HBS Press requires that these be individually purchased. Therefore, you will find two different HBR purchase links on the Carmen course home page:

- one link (<http://cb.hbsp.harvard.edu/cbmp/access/51657694>) will give you access to the 12 HBR articles (if you choose to purchase those rather than use the OSU library source);
  - the second link (<http://cb.hbsp.harvard.edu/cbmp/access/51656879>) will contain the 4 cases so that you can purchase those separately.
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**Case/Discussion Questions:** The case questions for preparation and discussion for each class session where appropriate are listed at the end of this syllabus.

## **Course requirements and grading**

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The course will include a mix of class discussions, textbooks, articles, class exercises, class participation, a mid-term paper, and a final written assignment.

Grades will be based on the following criteria:

A.Mid-term paper assignment (5-6 pages; due 9/14)	40%	80 pts.
B.Final paper assignment (6-8 pages; due 10/10)	60%	120 pts.
C.Class contribution (see below)	--	--
Total	100%	200 pts.

A.Mid-term assignment (80 pts.) The mid-term assignment will be ***a strategic analysis of a company of your choice***. You will be asked to complete a 5-6 page paper which analyzes that company's business model, their statement of strategic intent, their SWOT analysis, their key strategic priorities, and the resulting "symmetry". In other words, you will use the readings and class discussions through the class on 9/12 of the term to evaluate the effectiveness of their strategic intent against the criteria outlined through that point in the course: Business model, core purpose and values, customer positioning, competitive position, SWOT analysis, statement of strategic priorities and the "symmetry" that exists (or doesn't exist) among these components. Only condition is you can't use any companies identified in the cases from the course reading list (i.e. Patagonia, Sun Life, eHarmony, Four Seasons, or Zappos). You may use company reports, company web site info, 10-K's, 8-K filings, investment analyst conference proceedings, investment management firms research coverage, business media coverage, etc. Edgar Online, Hoovers, Bloomberg, etc. are great search sources. A more detailed prospectus for this assignment will be distributed and discussed in class prior to the paper's due date. That prospectus will be the formal 'requirements' for the assignment, not this syllabus description. ***These papers will be due at the start of class on 9/14.***

B.Final paper assignment (120 pts.) There will be two sections to the final paper: Section 1 will be an analysis of an assigned case which will be announced in class on 9/28. It will be a case of one organization's strategic planning process that you will be asked to critique. Section 2 will be further analysis ***using the same company you selected for the mid-term. You will be asked to submit an analysis of that company on the areas of strategy alignment and execution.*** You will be using the general structure and content of the final sessions of the course to evaluate that company on their alignment and execution. A much more detailed prospectus for this assignment will be distributed and discussed in class prior to the paper's due date. That prospectus will be the formal 'requirements' for the assignment, not this syllabus description. ***These papers will be due at the start of class on 10/10.***

C. Class contribution. I will be looking for you to provide your insights, thoughts, perspectives and questions in a professional, productive manner. ***Attendance and engagement matters!*** Participation in class is desired and expected for a wide variety of reasons, including the value of learning from one another and the wide variety of life perspectives and experiences of the class.

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Class contribution (as judged by the instructor) will be “scored” as follows:

-exceptional : consistent, high quality engagement	<b>up to plus one letter grade</b>
-expected participation: what’s expected from an MBA:	<b>grade based on pts. only</b>
-less engaged: consistency and quality less than expected:	<b>up to minus one letter grade</b>

**-Attendance.** Since class contribution is part of the grading consideration, then attendance matters. I will circulate a sign-in sheet at the start of each class for your signature. This will be the basis for determining unexcused absences. ***There will be one unexcused absence for the term. Any unexcused absence beyond the first without advance notice will adversely impact your class participation evaluation, unless due to a true emergency.*** Regarding excused absences, I assure you I am extremely understanding about such issues, and realize that people (even MBA students!) have personal lives. I know there will be the occasional personal emergencies or business travel that come up. I will absolutely consider such issues as legitimate, excused reasons to miss a class...**as long as you let me know in advance, if possible.** This advance notification will be on the honor system...you do not need to provide any documentation. Rather simply notify me before class that you have a personal or professional conflict that will cause you to miss class. ***Please do not exploit this privilege!*** This applies to both class attendance and assignment due dates.

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## Course Policy Statements

**Diversity.** We will, as a group and as individuals, hold ourselves accountable for demonstrating an openness to and appreciation for the ideas of others. ***This means being conspicuously respectful of each other on all occasions and in all of our class transactions.*** That also includes NOT surfing the web or reviewing email during class sessions. In addition, you have every right to be treated respectfully by your course professor, as well. We should hold each other accountable for creating a class environment where all of us can feel free to contribute our ideas, and can trust that our participation will be valued.

**OSU Disability Policy:** The University strives to make all learning experiences as accessible as possible. If you anticipate or experience academic barriers based on your disability (including mental health, chronic or temporary medical conditions), please let me know immediately so that we can privately discuss options. You are also welcome to register with Student Life Disability Services to establish reasonable accommodations. After registration, make arrangements with me as soon as possible to discuss your accommodations so that they may be implemented in a timely fashion. SLDS contact information: [slds@osu.edu](mailto:slds@osu.edu); 614-292-3307; slds.osu.edu; 098 Baker Hall, 113 W. 12th Avenue.

**Academic Misconduct:** The Ohio State University’s Code of Student Conduct, Section 3335-23-04 defines academic misconduct as: “Any activity that tends to compromise the academic integrity of the University, or subvert the educational process.” Examples of academic misconduct include (but are not limited to) plagiarism, collusion (unauthorized collaboration), copying the work of another student, and possession of unauthorized materials during an examination. Ignorance of the University’s Code of Student Conduct is never considered an “excuse” for academic misconduct. The Ohio State University and the Committee on Academic

Misconduct (COAM) expect that all students have read and understand the University's Code of Student Conduct, and that all students will complete all academic and scholarly assignments with fairness and honesty. Failure to follow the rules and guidelines established in the University's Code of Student Conduct may constitute "Academic Misconduct." Sanctions for the misconduct could include a failing grade in this course and suspension or dismissal from the University. For more information, please reference:

<http://oaa.osu.edu/coamfaqs.html#academicmisconductstatement>

**Assignments and Attendance.** Assignments are due on the dates indicated, and since class participation is part of the grading consideration, then attendance matters. Having said that, I am extremely understanding about such issues, and realize that people (even MBA students!) have personal lives. I know there will be the occasional personal emergencies (e.g. a sick uncle, a child taken to the ER, etc.) right before an assignment is due. I will absolutely consider such issues as legitimate reasons to reach alternative due dates for assignments...as long as you let me know about issues, in advance if possible. ***Please do not exploit this privilege!***

**Enjoyment.** I teach at the MBA level because I enjoy it ! Yes, believe it or not. I encourage you to enjoy the course, as well. A sense of humor doesn't hurt either.

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### **Case questions for all MHR 7223 assigned cases: Fall 1 2016 (Rucci)**

#### **WED 9/7: eHarmony:**

- Why do people use on-line dating services instead of finding dates in the "real world"?
- Does eHarmony have a competitive advantage? If so, where does it come from?
- Who is the eHarmony's competition, and is the competitive threat serious?
- Which of the four strategic options should the CEO pursue?

#### **MON 9/12: Four Seasons:**

- Describe the situation regarding the George V. What obstacles did the re-opening face?
- Based on the case (and a peak at their web site?), how would you state the core purpose and core values of the Four Seasons firm? Do they seem to guide strategy?
- What were the key areas that they seemed to focus on in the George V re-opening, and what actions did management take to support those areas?
- Based on the George V re-opening as a representative example, how might you identify the 4-5 global 'strategic priorities' for the entire Four Seasons chain, and cite some of their global actions in support of each.

#### **MON 9/26: CitiBank:**

- Why has CitiBank introduced a performance scorecard?
- Generally speaking, how would you evaluate Citi's balanced scorecard against the Kaplan and Norton model?
- What rating and bonus decision would you make on McGaran?
- What lessons might be taken from this case regarding introducing a balanced scorecard?

**MON 10/10: Sun Life:**

- What's the situation between 1995-2000 regarding Sun Life's strategic planning process? That is, what's working well, what isn't?
- How effectively have they aligned the organization behind the strategy? Do they have metrics? Is strategy tied to compensation? Have they communicated their strategy well?
- What do you think of the Briar's Retreat process? Is it a continuation of, in parallel to, or in competition with the core business planning process? If you were advising the CEO, would you suggest they continue to use this process: why or why not?