

BUSMHR 4490

0060-LEC(4169)  
0061-REC(4170)

SPRING SEMESTER 2018

TU/TH 7:30-8:50 pm

ROOM SB 315

MAX M. FISHER COLLEGE OF BUSINESS

THE OHIO STATE UNIVERSITY

INSTRUCTOR: JOE TESTA

## **INSTRUCTOR INFORMATION**

Joe Testa

E-mail: testa.9@osu.edu

Cell phone: 614-361-7359

Office: 042 Fisher Hall

O.S.U. Office hours: Immediately before/after class or by appointment

## **BACKGROUND**

Tax Commissioner, State of Ohio 2011-present

Testa Management Strategies, LLC 2009-2010

Franklin County Auditor 1992-2009

Franklin County Recorder 1985-1992

Chief Deputy County Recorder 1981-1985

Asst. Employee Relations Manager- Stokely Van Camp 1976-1981

Production Supervisor Harris Semiconductor Corp. 1973-1976

Quality Assurance Technician-Kennedy Space Center, Florida, Bendix Corp. 1966-1973

US Navy 1968-1972 Vietnam Service Medal

## **EDUCATION**

MLHR- The Ohio State University

BA- Public Administration-University of Central Florida

## **EDUCATION RELATED EXPERIENCE**

Fisher College of Business, The Ohio State University-2005 to present

Teaching: BA 799/ BUSMHR 4490 Strategic Management

Adjunct Faculty-Columbus State Community College -2001-06

Courses taught: Management, Organizational Behavior, Business, Business Ethics, and Managing Interpersonal Skills

Developed and Taught: High school program entitled "Rock, Roll & Vote" 1985-2005

Tutor eighth grade Columbus Public School students for proficiency test 1992-2006

## **PROFESSIONAL & COMMUNITY AFFILIATIONS**

President, County Auditors Association of Ohio 1998

Member: Executive / Legislative Committee 1993-2009

President, Columbus Literacy Council 1998-2000

Founder, Operation Flag 1988 - present

Founder: Cornerstone Academy Community School 2001

Chair Advisory Committee 2001-2006

## **COURSE SCHEDULE (reading numbers correspond to the course packet )**

1/09 Introduction, course overview

1/11 Strategy Exercise, Public Speaking Tips

1/16 Career Presentation Ideas (minus 20 minutes)

1/18 Film: Pirates of Silicon Valley (plus 20 minutes)

1/23 How Teams Succeed and Fail

1/25 Team exercise

1/30 What is Strategy? Readings # 4134, Ch. 1, Begin Career Strategy Presentations

2/01 External Analysis, Ch 2

2/06 Strategic H.R.; Teaching Smart People How to Learn (# 4304) Team outlines due

2/08 Internal Analysis, Ch. 3

2/13 Competitive Environ. Strategies: When Does It Pay to be Green? Reading; CMR 334

2/15 Vertical Integration, Ch. 6

2/20 Business Level Strategy, Ch 4 Cost Leadership

2/22 Cost Leadership Continued

2/27 Business Level Strategy, Ch 5 Product Differentiation

3/01 Product Differentiation Continued

3/06 Blue Ocean Strategy; Reading; R 0410 D

3/08 Blue Ocean Exercise

3/13 Spring Break

3/15 Spring Break

3/20 Personal Career Strategies

3/22 Presentations of The Home Depot and Lowe's, Readings; 9-512-036; W 12030

3/27 Personal Career Strategies

3/29 Presentations of Yum! Brands, Inc. and Wendy's, Readings; 9-712-422 ;UV 1739

4/03 Personal Career Strategies

4/05 Presentations of Ford and G.M., Readings; 9-511-132 ; IMD 772

4/10 Personal career Strategies

4/12 Presentations of Chevron and B.P., Readings; W94C16, KS 1224

4/17 Personal Career Strategies

4/19 Course Wrap Up, Peer Evaluations

4/26 Final (8:00- 9:45)

**Text: Strategic Management & Competitive Advantage; Barney & Hesterly;  
Pearson, Prentice Hall (any edition)  
Course Packet available at Uniprint**

## **COURSE OBJECTIVES**

This is a capstone course for Business Management. This will be the culmination of your coursework previously completed and synthesized for application of strategic management. Organizations must understand and effectively utilize these principles and practices in order to attain and sustain a competitive advantage in the market place. The modern pressures of the business environment require that if they don't they will lose their previous advantage and dissolve.

This course is primarily focused on strategic analysis and techniques through the examination of case studies. You will be working in teams and individually to analyze cases and develop a viable strategy. Recommendations will be made, for the subject organization, to the class as if being presented to the Chief Executive Officer (CEO) and/or The Board of Directors of the subject organization.

## **CLASS FORMAT AND EXPECTATIONS**

The primary emphasis of this class will be the utilization of oral presentation and writing skills to effectively convey a cogent set of recommendations. Organizing your thoughts and presenting them in a clear, effective and professional manner is as critical in the business world as any other ability you possess. There will be emphasis on class participation and preparedness appropriately reflected in your classroom contribution grade. Your classroom contribution grade will be based on your regular insightful contribution to each classroom discussion. Your evaluations of team presentations will help supplement this grade.

### **Student Class Contribution Rubric**

Points: Frequency and content

10	Consistent and insightful throughout the semester
8	Fairly consistent and supportive
6	Inconsistent yet supportive
4	Occasional and neutral in content
2	Rare and neutral in content
0	No contribution

You will be given the assignments in advance and you will be expected to have read the material prior to class. You may be called upon at random to share that preparation with the class.

All work is due as assigned. Late assignments may be accepted at my discretion with an accelerated decreasing grade of 10% of the assigned grade for each class period. This includes power point screens and individual as well as team papers.

Attendance is required for this course. Missed classes, arriving late, or leaving early will be noted and will negatively impact your grade. A deduction of ½ point per unexcused class missed or for every two instances of being late or leaving early without prior notice will be made. Unavoidable schedule conflicts may be excused if communicated to me in advance and if not abused.

Note: Class Contribution and attendance are two separate elements. Even if you have an excused absence which will not count against your attendance grade it will reduce your opportunity to contribute.

## GRADING CRITERIA

### Individual Work

Attendance	5 %
Quizzes	30% (6@ 5% each) drop two lowest grades out of 8
Classroom Contribution	10 %
Personal employment/ career strategy	20 %

### Team Work

Case presentation & paper	25 %
Peer Evaluation	10 %
Blue Ocean Bonus	2 %

## TEAM CASE PRESENTATION AND PAPER

Each student will be assigned to a team. Each team will be assigned a firm for analysis and a date for formal presentation.

Professional attire is required for these presentations. **Each team presentation will be allocated 30 minutes, which includes 3 minutes for Q & A.** Each team member must present an approximately equal amount of time. The team will select a name, create a logo and will present a set of the power point screens to me and all students at the beginning of their presentation. (Limited to four screens per page)

Each team will be given an outline to complete as noted and a team status report submitted two weeks prior to their assigned presentation. Forms for each of these will be provided.

Additionally e-mail me a set of all final graphs/charts and activated links to all source material cited no later than the assigned time & date of your presentation. These citations are to be separated and titled for each section of the paper (e.g. Financial Analysis, Environmental Analysis etc.) Collaboration is to be limited to your team members. **All case assignments must be brought up to date.**

**TEAM CASE PRESENTATION and PAPER ELEMENTS**  
**No specific length is required. Paper: Double spaced and two sided.**

I. Executive Summary

- a. Brief history of the firm
- b. Financial Summary Statement
- c. Summary of Recommendations

II. Industry Analysis

- a. Best and worst practices. What is being done and by whom?
- b. Porter's 5 forces model.
- c. Forward/Reverse integration review

III. Environmental Analysis

Describe the six interrelated elements; Demographic Trends, Cultural Trends, Economic Climate, Legal and Political Conditions, Specific International Events and Technological Change in light of their impact on the firm and industry currently or in the future

IV. Financial Analysis of the Firm

- a. Accounting Ratios
  1. Must select one of the ratio models from each type (profitability, liquidity, leverage and activity)
  2. Graph "most current" year plus 3 prior years for subject firm & three competitors. E-mail your graphs to me prior to your presentation.
- b. Analysis of each of the ratio graphs above.

V. Recommendations for subject firm. This element should be the **most comprehensive**.

- a. Immediate
- b. Short term (6 months to 1 year)
- c. Long term (1 to 3 years)
- d. Blue Ocean Bonus

VI. Bibliography (minimum of 6) not counting the text or the course packet.

Blue Ocean Recommendation Bonus

This recommendation must challenge the possibilities of "uncharted waters". It must be accompanied by a strategy for implementation with enough structure timelines, goals metrics to appear feasible. Include the key elements: New customer base, Product differentiation and Cost leadership strategies.

All team members will conduct peer evaluations at the end of the semester. I reserve the right to reduce any student's grade from the team case grade for his/her significant failure to contribute to the team project.

## **INDIVIDUAL ASSIGNMENTS**

**These assignments are to be accomplished without collaboration.**

### 1. Personal Career Strategy Paper and Presentation

Each student will prepare a written career strategy in narrative form, typically two to three pages in length and double spaced which will be due on the date of presentation with a set of power point screens if used. You will be called upon to make an 8-10 minute oral presentation to the class. When these presentations begin I will ask for volunteers. If there are none, I will call on students randomly to present. Failure to be prepared at that time will result in a 10% deduction of your grade for this assignment (2 points) and likewise an additional 2 points for each subsequent class period in which you are still not ready. Completion of this assignment includes an individual review with me and critique of your presentation and paper.

Key Elements:

- a. Identify your career goal (minimum 5 Years)
- b. Conduct a personal SWOT analysis
- c. Review your work experience( paid and unpaid)
- d. Identify the strategic advantages you obtained or enhanced from your work and educational experiences(be descriptive)
- e. Articulate the transferability of these strategic advantages to your career goal
- f. Establish a career sustainability plan
- g. Identify secondary goal(s)

2. There will be four unannounced quizzes and four scheduled quizzes from the assigned readings available to each student. Each quiz is worth up to 5 points. The two low grades will be dropped and there will be no makeup quizzes.

## **ACADEMIC HONESTY**

No case write ups, exams or notes from previous business school students should be consulted or copied in developing your case analysis. Any material quoted directly or paraphrased must be referenced in your work. Plagiarism and copyright infringement are serious infractions and will be dealt with accordingly. Collaboration beyond the identified limits cited herein is prohibited without my prior approval. Personal electronic devices; e.g. Cell phones, tablets, Laptops etc. are not to be used during class **except as otherwise explained by me**. If an emergency communication is expected please notify me.

Incidents of dishonesty observed by me will negatively affect your grade up to and including failure of the course.

### **Disability Policy**

Students with disabilities or requiring special accommodations must notify me of such needs at the beginning of the semester. You should work directly with The Ohio State University Office of Disability Services (ODS). ODS is expert at working with individual students to provide the appropriate assistance. Should you require special instruction for the course, please provide a written request from ODS

Fisher College of Business strongly enforces University attendance policies. As per University rule 3335-8-33, any student may be removed from a course for failure to attend by the first Friday of the term, or by the 3<sup>rd</sup> instructional day of the term, or by the second class meeting, ***whichever occurs first.***

### **NOTES:**

Assignments and /or schedule may be altered at my discretion as to facilitate this course. Finally: Leadership and Management of an effective Competitive Strategy in a dynamic and fluid business environment or in your career is hard work, challenging, rewarding, exasperating and fun. Let's get started!



## Readings & Cases 2018-2019

1. Michael E. Porter, “What is Strategy” Harvard Business Review On Point Article, Boston, MA: Harvard Business School Publishing, Product (Nov-Dec 1996) No. 4134
2. Chris Argyris “Teaching Smart People How to Learn” Boston, MA. Harvard Business Review On Point Article, (May-June 1991) HBSP Product No. 4304
3. Renato J. Orsato, “Competitive Environmental Strategies: When Does It Pay To Be Green?”, California Management Review, (2/01/06) CMR 334
4. W. Chan Kim and Ren’ee Mauborgne “Blue Ocean Strategy,” Boston, MA: HBSP, (October 2004) Reprint No. R0410D
5. Ian Dunn, “Lowe’s Companies, Inc.”, Richard Ivey School of Business (4/9/12) W12030
6. Jose B Alvarez, Zeynep Ton, Ryan Johnson “Home Depot and Interconnected Retail “. Harvard Business School, (March 22,2012) 9-512-036
7. Richard Brownlee II, “ Wendy’s Chili: A Costing Conundrum”, Darden Business Publishing, University of Virginia, (Rev. Feb 18, 2014) UV 1739
8. Jordan Siegel, Christopher Poliquin, “ Yum! Brands”, Harvard Business School, (Rev; October 5, 2012) 9-712-422
9. Zahir Dossa, “ Back to the Future: GM and the Electric Vehicle”, IMD School of Business, (2014) IMD 772
10. V. Kasturi Rangan,Katherine Lee, Marie Bell, “ Ford Motor Company: Strengthening the Dealer Network”,(Rev; July 30, 2015) 9-511-132
11. Jennifer Weeks, “ The Deepwater Horizon Oil Spill: Responding to the Crisis in the Gulf of Mexico”, Harvard Kennedy School (2017 BP Case.) KS 1224
12. Ekaterina Loshakova; et al, “ Chevron and Chad: A Pipeline Dream? “ ERB Institute, University of Michigan, (2/27/15) W94C16