

**Carnegie Mellon University H. John Heinz III College**  
**Strategy Development – 94811 Sections A1 and B1, Fall 2024**  
**Course Overview and Syllabus**

**Instructor**

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**Teaching Assistants**

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**Course Description**

This course introduces students to frameworks for understanding strategy development and implementation. Through a combination of theory and practice, students will be exposed to processes for formulating a sound, rational business strategy as well as the discipline required to successfully implement that strategy. Course activities and concepts include: 1) situational and environmental analysis, 2) internal capabilities assessment, and 3) appropriate linkage to an organization’s vision, mission, objectives, and historical performance. In addition, although these processes are most often attributed to private sector operations, this course is designed to consider the similarities and differences of strategy development in government entities and nonprofits as well. There are no prerequisite courses.

**Course Objectives**

<b>Learning Objective</b>	<b>How Assessed</b>
Understand a broad overview of strategic thinking, strategy development, and tactical execution in a variety of contexts.	Class participation; case discussion, assignments, discussion board
Describe and utilize foundational concepts and frameworks that are used “in the real world” to craft winning strategies.	Class participation; case discussion, assignments, discussion board
Identify and clearly define a problem/issue; analyze and question data and information in a rigorous manner.	Class participation; case discussion, assignments, discussion board
Listen to, respect and heed the advice and ideas of others	Class participation; case discussion, assignments, discussion board

**Course Materials (all materials are listed in the Course Schedule section of this syllabus)**

- 1) 6 Case studies
- 2) Articles (there is no textbook for the class)
- 3) **NOTE:** All materials are on Canvas. This course uses course material from Harvard Business School that is not available for individual purchase. The cases and articles have been secured by Heinz College, and **students will receive a \$20 charge to their student accounts at the conclusion of the Drop / Add period.**

**Class Structure**

Classes typically consist of one case discussion and a review of the associated reading material. The readings are meant to provide theory and frameworks to assist in case analysis. Instructions for each class and questions to assist with case analysis are included in the ‘Course Schedule’ section of this syllabus. For classes where no case study is assigned, students are still required to complete the readings to be prepared for discussion.

**Expectations**

Typically, cases require 2 to 3 hours of preparation and readings/articles require 1 hour of preparation before the class date noted on the syllabus. It is expected that everyone will be prepared to discuss the cases and the readings. Please do not research companies in the cases to see what decisions they actually made unless

specifically asked to do so. You are permitted and encouraged to discuss cases and reading material before class in a study group with other members of the class.

**Class Attendance and Participation**

Class attendance and participation are critical for successful completion of the course. All students should actively engage in class discussions with the instructor, guest lecturers and one another, and be prepared to correctly answer questions about that day’s case, readings, or general topic. Attendance will be taken at every class, and participation will be noted as well. Students who attend every class and participate actively and meaningfully will receive a higher score. Impromptu questions and exercises will assess student preparation and readiness for class and will also be incorporated into the class participation score.

Absences: Students are permitted one absence during the mini, which can be used for illness, travel, a job interview, or other reason. Additional absences will result in a lower score. If you must miss a class, please notify me with as much advanced notice as possible. For any class that you miss, you are responsible for obtaining the notes and related materials from another student.

**Assignments and Discussion Board Posts**

Students will submit Assignments 1-3 to the Canvas discussion board, according to the “Assignment Due Date Schedule” table below. These posts will cover lectures, required readings, class discussions and guest lectures. Students will also be required to respond to a fellow student’s post as the second part of the assignment. Instructions regarding discussion board assignments can be found on Canvas under the Module for the first day of class.

**Course Performance Evaluation**

Performance will be evaluated based on the following:

Assignment 1	15%
Assignment 2	20%
Assignment 3	20%
Assignment 4	20%
Class Attendance and Participation	25%

Total course grade 100%

**Final grades are based on a curve** and are assigned based on your *relative* performance in comparison to classmates' performance. The Heinz College faculty has endorsed guidelines for assigning grades, stating that the mean grade in an elective course should be approximately 3.5 (B+).

**Assignment Due Date Schedule** (the first two items are not graded, but are required)

Assignment	Where to Submit	Deadline for Original Post: 11:59pm	Deadline for Response Post: 11:59pm
Syllabus Attestation	Assignments	Thursday August 29	N/A
Company Selection	Discussion Board	Tuesday September 3	N/A
1	Discussion Board	Tuesday September 10	Wednesday September 11
2	Discussion Board	Tuesday September 17	Wednesday September 18
3	Discussion Board	Tuesday October 1	Wednesday October 2
4	Assignments	Tuesday October 8	N/A

### **Questions Regarding the Course or Assignments**

All questions regarding the course should be posted to the Canvas discussion board. In this way, all students will be able to review answers to questions. Students are strongly encouraged to monitor the discussion board on a regular basis to ensure that they have up to date information. Please note that questions received via e-mail or phone, and last-minute questions may not be answered. The Canvas discussion board is also for you to interact with others in the course. Feel free to post questions, comments, and items of interest on this bulletin board. Personal questions regarding the course should be directed to the instructor.

### **Use of Electronic Devices**

Laptops, tablets, cell phones and other electronic devices are not permitted in class. There are two reasons for this:

- Research on learning shows that unexpected noises and movement automatically divert and capture people's attention, which means you are affecting everyone's learning experience if your cell phone, laptop, etc. makes noise or is visually distracting during class.
- The use of electronic devices in past courses has demonstrated that they are too distracting for students and can have an adverse effect on class performance.

If there is a specific day when students will require laptops during class, advance notice will be given.

### **Recording of Class Sessions**

No student may record or tape any classroom activity without the express written consent of the instructor. If a student believes that he/she is disabled and needs to record or tape classroom activities, he/she should contact the Office of Equal Opportunity Services, Disability Resources to request an appropriate accommodation.

For this course, I will be recording class sessions and making them available to you after classes for your personal, educational use. Recordings of class sessions are covered under the **Family Educational Rights and Privacy Act (FERPA)** and must *not* be shared with anyone outside your course-section. The purpose of these recordings is so students in this course (and only students in this course) can watch or re-watch past class sessions. The recordings are not a substitute for coming to class (you won't be able to join class remotely), and they will only become available after that day's class sections are finished. Feel free to use the recordings if you would like to review something we discussed in class or if you are temporarily unable to attend class.

### **Ethical Standards**

Students are expected to maintain the highest ethical standards with respect to plagiarism and cheating. Neither plagiarism nor cheating will be tolerated on any exercises, quizzes, exams or assignments. Students may collaborate with others only when expressly permitted by the instructor. Students who violate academic standards will at a minimum receive a failing grade for the assignment, and may also receive a failing grade for the course. Such cases will be referred to the Associate Dean, who may decide to take further action.

### **Students May Not use Generative AI in Any Form**

To best support your own learning, you should complete all graded assignments in this course yourself, without any use of generative artificial intelligence (AI). Please refrain from using AI tools to generate any content (text, video, audio, images, code, etc.) for an assignment or classroom exercise. Passing off any AI generated content as your own (e.g., cutting and pasting content into written assignments, or paraphrasing AI content) constitutes a violation of CMU's academic integrity policy. If you have any questions about using generative AI in this course please email or talk to me.

## **SUPPORT AND RESOURCES**

**Accommodations for Students with Disabilities:** If you have a disability and have an accommodations letter from the Disability Resources office, I encourage you to discuss your accommodations and needs with me as early in the semester as possible. I will work with you to ensure that accommodations are provided as appropriate. If you suspect that you may have a disability and would benefit from accommodations but are not yet registered with the Office of Disability Resources, I encourage you to contact them at [access@andrew.cmu.edu](mailto:access@andrew.cmu.edu).

**Communication Assistance:** The **Student Academic Success Center (SASC)** provides resources to all students in the following areas:

- **Academic Coaching** – This program provides holistic, one-on-one peer support and group workshops to help undergraduate and graduate students implement habits for success. Academic Coaching assists students with time management, productive learning and study habits, organization, stress management, and other skills. Request an initial consultation [here](#).
- **Peer Tutoring** – Peer Tutoring is offered in two formats for students seeking support related to their coursework. Drop-In tutoring targets our highest demand courses through regularly scheduled open tutoring sessions during the fall and spring semesters. Tutoring by appointment consists of ongoing individualized and small group sessions. You can utilize tutoring to discuss course related content, clarify and ask questions, and work through practice problems. Visit the [webpage](#) to see courses currently being supported by Peer Tutoring.
- **Communication Support** – Communication Support offers free one-on-one communication consulting as well as group workshops to support strong written, oral, and visual communication in texts including IMRaD and thesis-driven essays, data-driven reports, oral presentations, posters and visual design, advanced research, application materials, grant proposals, business and public policy documents, data visualization, and team projects. Appointments are available to undergraduate and graduate students from any discipline at CMU. Schedule an [appointment](#) (in-person or video), attend a [workshop](#), or consult [handouts or videos](#) to strengthen communication skills.
- **Language and Cross-Cultural Support** – This program supports students seeking help with language and cross-cultural skills for academic and professional success through individual and group sessions. Students can get assistance with writing academic emails, learning expectations and strategies for clear academic writing, pronunciation, grammar, fluency, and more. [Make an appointment](#) with a Language Development Specialist to get individualized coaching.

**An Inclusive Environment: We must treat every individual with respect.** We are diverse in many ways, and this diversity is fundamental to building and maintaining an equitable and inclusive campus community. Diversity can refer to multiple ways that we identify ourselves, including but not limited to race, color, national origin, language, sex, disability, age, sexual orientation, gender identity, religion, creed, ancestry, belief, veteran status, or genetic information. Each of these diverse identities, along with many others not mentioned here, shape the perspectives our students, faculty, and staff bring to our campus. We, at CMU, will work to promote diversity, equity and inclusion not only because diversity fuels excellence and innovation, but because we want to pursue justice. We acknowledge our imperfections while we also fully commit to the work, inside and outside of our classrooms, of building and sustaining a campus community that increasingly embraces these core values.

Each of us is responsible for creating a safer, more inclusive environment. Unfortunately, incidents of bias or discrimination do occur, whether intentional or unintentional. They contribute to creating an unwelcoming environment for individuals and groups at the university. Therefore, the university encourages anyone who experiences or observes unfair or hostile treatment on the basis of identity to speak out for justice and support, within the moment of the incident or after the incident has passed. Anyone can share these experiences using the following resources:

- **Center for Student Diversity and Inclusion:** [csdi@andrew.cmu.edu](mailto:csdi@andrew.cmu.edu), (412) 268-2150
- **Ethics Reporting Hotline.** Students, faculty, and staff can anonymously file a report by calling **844-587-0793** or visiting [cmu.ethicspoint.com](http://cmu.ethicspoint.com).

All reports will be documented and deliberated to determine if there should be any following actions. Regardless of incident type, the university will use all shared experiences to transform our campus climate to be more equitable and just.

**Food Insecurity:** If you are worried about affording food or feeling insecure about food, there are resources on campus that can help. Email the CMU Food Pantry Coordinator to schedule an appointment: Pantry Coordinator / [cmu-pantry@andrew.cmu.edu](mailto:cmu-pantry@andrew.cmu.edu) / 412-268-8704 (SLICE office)

***Please take care of yourself***

*The last few years have been challenging. We are all under a lot of stress and uncertainty at this time. I encourage you to find ways to move regularly, eat well, and reach out to your support system or me ([synnott@cmu.edu](mailto:synnott@cmu.edu)) if you need to. We can all benefit from support in times of stress, and this semester is no exception.*

*This course's workload is divided into weekly segments. Do your best to maintain a healthy lifestyle this semester by eating well, exercising, avoiding drugs and alcohol, getting enough sleep and taking some time to relax. This will help you achieve your goals and cope with stress.*

*All of us benefit from support during times of struggle. You are not alone. There are many helpful resources available on campus and an important part of the college experience is learning how to ask for help. Asking for support sooner rather than later is often helpful.*

*If you or anyone you know experiences any academic stress, difficult life events, or feelings like anxiety or depression, we strongly encourage you to seek support. Counseling and Psychological Services (CaPS) is here to help: call 412-268-2922 and visit their website at <http://www.cmu.edu/counseling/>. Consider reaching out to a friend, faculty or family member you trust for help getting connected to the support that can help.*

*If you or someone you know is feeling suicidal or in danger of self-harm, call someone immediately, day or night: CaPS: 412-268-2922 or Re:solve Crisis Network: 888-796-8226*

*If the situation is life threatening, call the police: On campus: 412-268-2323 or off campus: 911. If you have questions about this or your coursework, please let me know.*

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## **COURSE SCHEDULE**

For each class listed below, there are 'Instructions and Study Questions' to be used to guide and assist as you prepare for class. I do not expect written responses to these 'Instructions and Study Questions'; however, if students appear to be unprepared for class sessions, I may require written answers at a later point in the course. Note that these study questions are **not** to be answered for the Assignments, which are detailed on Canvas.

### **Monday August 26, 2024**

Topic: Class Introduction and Introduction to the Case Method

Reading Assignment – to be read prior to class

1. Course Syllabus (on Canvas)
2. "The Case Method" by David Lassman (on Canvas)

Video – to be watched prior to class

1. Strategic Planning Lecture (on Canvas)

Instructions and Study Questions:

1. Please read the course syllabus and the article, "The Case Method," and watch the pre-recorded lecture in preparation for our first class.
2. Sign the Syllabus Attestation (on Canvas)
3. Ensure that you will receive all course notifications. Go to: Canvas / Account (Upper Left) / Notifications then select the checkmarks next to three areas: Announcement, Discussion and Discussion Post.

### **Wednesday August 28, 2024**

Topic: Industry Analysis: The Five Forces

Case and Article Assignment: to be read prior to class

1. Cola Wars Continue: Coke and Pepsi in 2010 (HBS 9-711-462)
2. "The Five Competitive Forces That Shape Strategy" by Michael Porter (HBS R0801E)

Instructions and Study Questions:

1. Analyze the cola industry using the '5 Competitive Forces' model.
  - a) Potential Entrants: Why haven't others successfully challenged Coke and Pepsi? What are the barriers to entry?
  - b) Substitute Products: What are the substitute products and how are they doing relative to Coke and Pepsi?
  - c) Power of Suppliers: Consider the power of suppliers of cans, sweetener, and other raw materials
  - d) Power of Customers/Buyers: Consider the power of bottlers, sellers (grocery, restaurant, etc.) and end-users (customer who drink the CSD)
  - e) Cola Industry Rivals: Who are the rivals, including Coke and Pepsi, and how do they differentiate themselves? How many are there?
2. Why, historically, has the soft drink industry been so profitable? How has the competition between Coke and Pepsi affected the industry's profits?

**NO CLASS Monday September 2 (Labor Day)**

**Tuesday September 3, 2024 – Discussion Board Post Due – Company Selection**

**NO CLASS Wednesday September 4, 2024**

### **Monday September 9, 2024**

Topic: Vision, Capabilities and Coherence

Case and Article Assignment: to be read prior to class

1. Southwest Airlines: In a Different World (HBS 9-910-419)
2. "What Is Strategy?" by Michael Porter (HBS 96608)
3. "The Coherence Premium" by Paul Leinwand and Cesare Mainardi (HBS R1006F)

Instructions and Study Questions:

1. Why has Southwest been so much more successful than its competitors? In answering this question, consider the following four topics: 1) Who is Southwest's target market? 2) What is the customer experience like when flying Southwest? 3) What does Southwest do operationally with regards to airports, planes, fuel, etc? and 4) What are Southwest's HR policies and what is expected of employees?
2. How has the original strategy been altered in recent years? How, if at all, have these changes affected Southwest's key success factors?
3. Would you recommend that Southwest Airlines acquire the gates and slots available at LaGuardia Airport? Why or why not?
4. How does this decision fit with others that the airline's management has made recently or faces in the future?

### **Tuesday September 10: Assignment 1 Due**

### **Wednesday September 11, 2024**

Topic: Vision, Capabilities, Coherence in Health Care

Case and Article Assignment: to be read prior to class

1. Shouldice Hospital Limited (HBS 9-805-002)
2. "Why Strategy Matters Now" by Michael Porter and Thomas Lee, The New England Journal of Medicine, April 30, 2015. (on Canvas)

Instructions and Study Questions:

1. How successful is Shouldice Hospital? In answering this, consider the following four questions: 1) Who is Shouldice Hospital's target market? 2) What is the patient experience like, from the first contact with Shouldice through to the 'patient reunions'? 3) What does Shouldice do operationally with regards to facilities, procedures, etc.? and 4) What are Shouldice's HR practices and what is expected of employees?
2. What are the biggest risk factors for Shouldice going forward?
3. As Dr. Burns Shouldice (50% owner of the hospital), what actions, if any, would you take to expand the hospital's capacity? How would you implement the changes you propose?

### **Wednesday September 11: Assignment 1 Response Post Due**

### **Monday September 16, 2024**

Topic: Vision, Capabilities and Coherence

Case and Article Assignment: to be read prior to class

1. KaBOOM! (HBS 9-303-025)
2. "Building Your Company's Vision" by James Collins and Jerry Porras (HBS 96501)

Instructions and Study Questions:

1. Per the first page of the case (4<sup>th</sup> paragraph), a strategic shift was being contemplated:  
*"Rather than just continuing to directly build playgrounds with its corporate partners, KaBOOM! would increase its emphasis on indirect builds by providing training and grant programs to help communities independently replicate the community-build playground model. Additionally, KaBOOM! would become a knowledge leader and advocate for children's right to play."*
2. If you were Darell Hammond and the board of KaBoom!, what would you recommend, i.e. which of the strategic options would you choose and why? You may pick any one option or any combination of the

options in the case, including simply sticking with the current strategy's primary focus on directly building playgrounds with corporate partners.

### **Tuesday September 17: Assignment 2 Due**

#### **Wednesday September 18, 2024**

Topic: Creating Shared Value

Article Assignment: to be read prior to class

1. "Creating Shared Value" by Michael Porter and Mark Kramer (HBS R1101C)

Instructions and Study Questions:

1. Has the company you have been studying focused on corporate social responsibility and/or has it prioritized the creation of shared value? What evidence have you found?
2. If your company has not attempted to create shared value, how do you recommend that it do so?

### **Wednesday September 18: Assignment 2 Response Post Due**

#### **Monday September 23, 2024**

Topic: Entrepreneurial Strategy: The Innovator's Dilemma

Guest Lecturer: Brendan Synnott, serial entrepreneur, Co-Founder and former CEO of Bear Naked, CEO of PACT Organic, and numerous other companies.

Article Assignment: to be read prior to class

1. "Innovator's Dilemma: Introduction: Why Good Companies Fail to Thrive in Fast Moving Industries" by Clayton Christensen (HBS 1713BC)
2. Chapter 7 of The Innovator's Dilemma, by Clayton Christensen (on Canvas) – starts on pg. 14
3. 'Cisco's CEO on Staying Ahead of Technology Shifts': <https://hbr.org/2015/05/ciscos-ceo-on-staying-ahead-of-technology-shifts> (also on Canvas)

Instructions and Study Questions: you're encouraged to ask questions of Brendan during class.

#### **Wednesday September 25, 2024**

Topic: The Balanced Scorecard

Case and Article Assignment: to be read prior to class

1. City of Charlotte (A) (HBS 9-199-036)
2. "The Balanced Scorecard – Measures That Drive Performance" by Robert Kaplan and David Norton (HBS 92105)
3. Charlotte BSC 2014 and 2019 (on Canvas)

Instructions and Study Questions:

1. What do you think of Charlotte's Mission Statement and Vision?
2. What do you think Charlotte did well in the implementation of the BSC? What have they not done well and how could they improve?
3. Do you like the Balanced Scorecards developed by Charlotte as shown in the exhibits? Do you think they are useful? If not, why not?
4. Have you ever worked for an organization with a Balanced Scorecard or something similar? Was the scorecard explicitly tied to the organization's strategy? How successful was the scorecard in driving actions that supported the strategy?



### **Monday September 30, 2024**

Topic: Developing Strategic Options; Mergers and Affiliations

Article Assignment: to be read prior to class

1. “Why Good Companies Go Bad” by Donald N. Sull (HBS 99410)
2. “Seven Ways to Fail Big” by Paul Carroll and Chunka Mui (HBS R0809F)
3. “Not All M&As Are Alike – And That Matters” by Joseph L. Bower (HBS R0103F)

Instructions and Study Questions:

1. Review the news or search the internet for an example of a company that attempted, completed and/or failed to affiliate with another company (mergers, acquisitions, alliances or partnerships):
  - a. Was there a stated reason for the affiliation?
  - b. Do you believe the stated reason was the actual reason?
  - c. Identify what type of affiliation it was based on the Bower article (#3 article above)
  - d. Do you believe the affiliation was a wise strategy? Why or why not?

### **Tuesday October 1, 2024 – Assignment 3 Due (on Canvas Discussion Board)**

### **Wednesday October 2, 2024**

Topic: Strategic Decision Making

Article Assignment: to be read prior to class

1. Chapter 1: Mental Models and Strategic Decision Making, Transformative Planning by Jim Austin, 2018 (on Canvas)
2. “How Management Teams Can Have a Good Fight” by Kathleen Eisenhardt, Jean Kahwajy, and L.J. Bourgeois (HBS 97402)

Instructions and Study Questions:

1. Recall examples of when you were in a group setting and experienced each of the four decision traps (frame narrowness, confirmation bias, groupthink, and attribution bias) described in the Austin book?
2. If you could go back in time, how might you have tried to avoid each decision trap?
3. Have you observed any of the four decision traps at the management levels of an organization where you worked or were part of the community?
4. Have you experienced or observed any of the team dynamics described in the “How Management Teams Can Have a Good Fight” article? What approaches were effective or ineffective in leading to a successful decision?

### **Wednesday October 2, 2024 – Assignment 3 Response Post Due**

### **Monday October 7, 2024**

Topic: Strategy Implementation

Case and Article Assignment: to be read prior to class

1. Ben and Jerry’s Homemade Ice Cream: A Period of Transition (HBS 9-796-109)
2. “Bringing Science to the Art of Strategy” by A.G.Lafley, Roger Martin, Jan Rivkin and Nicolaj Siggelkow (HBS R1209C)

Instructions and Study Questions:

1. What issues face Ben and Jerry’s Homemade Ice Cream Inc. in 1995?
2. Is the first ever financial loss in 1994 due solely to the \$6.8 million write-down of the new factory or is something else going on? Are some components of Ben and Jerry’s cost structure higher than their competitors’?
3. At the time of the case, does Ben and Jerry’s have a clear and coherent strategy? Articulate it if you can.
4. What should Ben and Jerry’s strategy be going forward? How should they address quality, their requirement to use ‘Vermont natural dairy’ ingredients, the company’s ‘Hippie’ culture, their cost

structure, diversification (both in products and geography), etc. Consider how the first three steps in the “Bringing Science to the Art of Strategy” article could be used to formulate the strategy.

**Tuesday October 8, 2024 – Assignment 4 Due (Under the Assignments Section of Canvas)**

**Wednesday September 9, 2024 – LAST DAY OF CLASS**

Topic: End of Course Review and Discussion

Article Assignment: None

Instructions and Study Questions: None