BMA 5537 - Competitive Strategies
Fall Semester 2007
Monday-Wednesday 5:30 pm – 6:45 pm
Bloch Room 101

Leon Robertson, Ph.D.
Office: 207 Bloch School
Telephone:(816) 235-5259
Email:robertsonl@umkc.edu

COMPETITIVE STRATEGIES

I. Course Objectives

A. To learn and apply strategy concepts to "real" business situations through "live" studies of business organizations.
B. To acquire an understanding of how to perform an external assessment (political, economic, social and technology) for a business organization.
C. To acquire an understanding of how to perform a competitive assessment for a business organization.
D. To acquire an understanding of how to perform an internal assessment (marketing, operations, finance, management, etc.) for a business organization.
E. To learn the concepts and skills necessary for formulating and/or evaluating strategies for a business organization.
F. To develop skills for making strategy presentations and responding to critical questions from an evaluative audience.
G. To develop skills for preparing written executive reports for the presentation of strategy recommendations and evaluations.

II. Program of Study

The class will be organized into project teams consisting of 4-5 students per project with the number of project teams limited to six. Each project team will be assigned a company from the attached list of Kansas City Corporations. Sources of information regarding these companies are shown on the attachment, Sources of Company Information.

A. The course will be delivered in four major components, as follows:

(1) Strategy concepts and analytical tools- this component will be delivered through lectures and consultations during the first half of the course. The content of this component is contained in Strategic Management Handbook – Fifth Edition, which is available at bookstore.
(2) Research on Assigned Companies- This component will involve research and analysis on the assigned companies with emphasis on competitive strategy. The concepts and analytical tools covered in the first component will be used for this work. Students also may use concepts and analytical tools from other sources. The professor will consult with the teams during the period of field research.
(3) Presentation and Report- Each team will prepare a formal report on their assigned company and will make a PowerPoint presentation of their work during the last half of the course.

A suggested outline of the presentation is attached. The formal report should contain only the strategy component of the study. All members of a project team should participate equally in the research, analysis, report preparation and presentation. Any imbalance in participation and contribution should be brought to the attention of the professor.

(4) Each team will perform a comparative strategy exercise for their company. The exercise methodology will be presented by the professor.

III. Basis for course Grade

The course grade will be based primarily upon an evaluation of the work of the project teams as evidenced by the formal report and presentation. The specific elements of the final grade consist of the following:

	Weight
1. Participation, both active and passive, in all components.	20%
2. Overall evaluation of the team presentation.	20%
3. Individual evaluation of each team members' presentation.	20%
4. Overall evaluation of the team's formal report.	20%
5. Exercise evaluation of Comparative Strategy (Team and Individual)	20%
	100%

IV. Grade Appeals

A copy of the Student Grade Appeal procedure is on file and can be obtained from the secretary in the BA Division office, room 334, of the Bloch School.

V. ADA Policy

If you have any questions, disability of desire accommodations under the Americans with Disabilities Act, please contact the Office of Disabled Student Services, 235-5696.

VI. Class Attendance

Due to the subject of the course material, class attendance and participation is an integral part of the learning experience. If you are unable or unwilling to regularly attend class due to work commitments, family responsibilities, duties as an officer of member of a student organization, lack of interest, or other extra-curricular student activity, you should withdraw from this course.

VII. Class Room Activities

Students are expected to conduct themselves in a professional manner during class sessions. Any activity, with distracts from lecturers, discussions and project presentations should be avoided.

BMA 5537 – Competitive Strategies
Fall Semester 2007 Schedule

Date	Day	Assignment
8/20	M	Course Introduction
8/22	W	Company Assignments
8/27	M	Lecture: Strategic Overview
8/29	W	Lecture: External Assessment
9/3	M	Labor Day Holiday
9/5	W	Open Assignment
9/10	M	Lecture: Internal Assessment
9/12	W	Lecture: SWOT Analysis & Strategy
9/17	M	Consultation: Team 1 – Sprint Nextel
9/19	W	Consultation: Team 2 – Kansas City Southern
9/24	M	Consultation: Team 3 – Payless Shoe Source.
9/26	W	Consultation: Team 4 – Waddell & Reed
10/1	M	Consultation: Team 5 – Garmin Ltd
10/3	W	Consultation: Team 6 – Great Plains Energy
10/8	M	Presentation: Team 1 – Sprint Nextel
10/10	W	Presentation and Critique: Team 1 – Strategy

BMA 5537 – Competitive Strategies
Fall Semester 2007 Schedule

Date	Day	Assignment
10/15	M	Presentation: Team 2 – Kansas City Southern
10/17	W	Presentation and Critique: Team 2 – Strategy
10/22	M	Presentation: Team 3 – Payless Shoe Source
10/24	W	Presentation and Critique: Team 3 – Strategy
10/29	M	Presentation: Team 4 – Waddell & Reed
10/31	W	Presentation and Critique: Team 4 – Strategy
11/5	M	Presentation: Team 5 – Garmin Ltd.
11/7	W	Presentation and Critique: Team 5 – Strategy
11/12	M	Presentation: Team 6 – Great Plains Energy
11/14	W	Presentation and Critique: Team 6 – Strategy
11/19	M	Thanksgiving Break
11/21	W	Thanksgiving Break
11/26	M	Comparative Strategy: Teams 1, 2, 3
11/28	W	Comparative Strategy: Teams 4, 5, 6
12/03	M	Comparative Strategy: Conclusions
12/05	W	Final Session Company Strategy Report Course Instructor Evaluation

BMA 5537 – Competitive Strategies

Kansas City Corporations Assigned Studies

1. Sprint Nextel
   www.sprint.com

2. Kansas City Southern
   www.kcsouthern.com

3. Payless ShoeSource
   www.Payless.com

4. Waddell & Reed
   www.waddell.com

5. Garmin Ltd
   www.garmin.com

6. Great Plains Energy
   www.greatplainsenergy.com

Sources of Company Information

1. Company annual reports.

2. Company proxy statements.

3. 10Q and 10K reports.

4. Research reports from investment analysts.

5. Company documents (primarily marketing).

6. Magazine and newspaper articles.

7. Interviews with company personnel.

8. Company websites and other internet sources.

BMA 5537 – Competitive Strategies
Selected Content of Company Studies

I. Description of Company & Industry

A. Products & Services
B. History of Company
C. Industry & Competition
D. Stock Price History
E. Organizational Overview
F. Size Statistics

II. External Influences

A. Political & Regulatory
B. Economy & Business Cycle
C. Social & Demographic
D. Technology
E. Opportunities & Threats

III. Management

A. Corporate Governance (BOD)
B. Organization Structure
C. Top Management
D. Executive Compensation & Incentives
E. Management Strengths
F. Management Weaknesses

IV. Marketing & Operations

A. Operating Facilities & Capabilities
B. Products & Markets
C. Competitive Analysis
D. Operating Strengths & Weaknesses
E. Marketing Strengths & Weaknesses

V. Financial

A. Balance Sheet Analysis
B. Income Statement Analysis
C. Cash Flow Analysis
D. Segment Analysis
E. Return on Investment Analysis
F. Financial Strengths & Weaknesses

VI. Strategy

A. Business (Economic) Model
B. SWOT Analysis – Top Level
C. Risk Analysis
D. Competitive Strategies – Problems & Issues
E. Recommendations & Future Expectations

BMA 5537 - Competitive Strategies

Evaluation of Presentation

	Name	Maximum	Points	Content	Articulation	Visuals
*** Description**						
1. Company and Industry		10				
2. Management and Organization		10				
3. Marketing and Operations		10				
4. Financial and Accounting		10				
5. External Influences		10				
*** Strategy**						
1. Business (Economic) Model		10				
2. SWOT Anaysis (Top Level)		10				
3. Risks Analysis (Internal & External)		10				
4.Competitive Strategies (Problems & Issues)		10				
5. Recommendations & Future Expectations		10				
*** Response to Questions**						
1						
2						
3						
4						
5						
Total	**Team**	**100**				