



## JWI 540: Strategy

### Course Guide

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### MISSION

*"For strategy to mean anything it has to come alive; it's got to be vibrant. It has to be the most agile thing about the company."*

– Jack Welch –

### COURSE DESCRIPTION

In this course, students will learn how to define their organizations' capabilities in order to implement and execute a winning strategy, identify strategic options, select the best winning strategies, successfully execute them, and track results. Using Jack Welch's approach to developing and evaluating a strategy, students will create an effective plan of action designed to achieve the higher-level goals of an organization. Students will learn how to think holistically in terms of relating their day-to-day decisions to strategic outcomes and will use the process to consistently evaluate decisions. Students will learn how to use their knowledge of customer behavior and analysis of the internal and external environments to plan a strategy based on what the organization can accomplish. Students will identify necessary evaluative criteria for uncovering risk and develop plans for proactively addressing risks inherent to strategy.

### OUR APPROACH

We approach the study of strategy development and execution from the principle that effective strategies must be simple to articulate and must be well understood by everyone in the organization. To support this, we will leverage Jack Welch's 5-Slide approach to strategy as a *communication tool* that enables business leaders to ask the right questions and to articulate their game plan in a concise manner that cuts through complexity and gets at what really matters. To support students in leveraging this model for their own use, we will frequently revisit it as we cover key concepts, tools and real-world examples throughout the course. Additionally, we will leverage the following learning opportunities:

1. **Cases and Examples** to illustrate companies that got it right (or got it wrong) when developing and executing their strategies.
2. **Discussion Questions** to explore key topics in strategy development, and to exchange information and ideas among peers and instructor.
3. **Strategy Development Project** to allow you to explore and develop successful strategy practices, and to dive deeper into how these practices can be leveraged to help your company create a sustainable competitive advantage.



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#### COURSE ORGANIZATION AND OVERVIEW

Weekly Topics	Synopsis
1. What is Strategy?	<p>Part I of our course is focused on understanding the role of strategy in building a winning business. We begin our journey by taking a brief look at some of the most popular models for strategy development to better understand what strategy is and isn't. We will focus on the importance of aligning strategy to the mission and values of the organization and will introduce tools that can help you decide where to compete and where not to compete.</p>
2. Defining the Playing Field?	
3. Pursuing the Right Kind of Growth	
4. Assessing Risk and Reward	
5. Exploring Strategic Options	<p>In Part II, we turn our attention to exploring the kinds of strategic moves that most frequently lead to sustainable competitive advantages. We will contrast these with <i>incremental</i> changes which (while often important) are not typically drivers of long-term market leadership.</p> <p>The best performing organizations are those that have a strong brand image of what they stand for; continue to innovate and create meaningful product differentiation; improve their capabilities; reach into new markets through mergers and strategic partnerships; and beat their competition with operational or financial efficiencies that allow them to deliver better (and often cheaper) solutions to their customers.</p>
6. Creating Meaningful Differentiation	
7. Identifying Game-Winning Moves	
8. Mergers and Acquisitions	
9. Executing the Plan	<p>In the final two weeks, we will move into Part III of our course which is focused on bringing the strategy to life. No strategic plan, however well-conceived, will create a sustainable competitive advantage if it isn't well implemented and continuously evaluated.</p> <p>We will examine the steps needed to (1) communicate the strategic plan (2) make it happen, and (3) assess the strategy's success. We explore tools that can help you determine if you need to push on through rough patches or make course corrections.</p>
10. Managing the Strategy	



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## INSTRUCTIONAL MATERIALS

### Required Resources

- Sherman, L. (2017). *If You're in a Dogfight, Become a Cat*. New York: Columbia University Press
- Welch, J. & Welch, S. (2005). *Winning*. New York: HarperCollins.

**NOTE:** Your course textbook, [If You're in a Dogfight, Become a Cat!: Strategies for Long-Term Growth](#), is available in the University Library. Please follow the steps [here](#) to download PDF Chapters of this eBook.

## COURSE LEARNING OUTCOMES

1. Validate the relationship between an organization's vision and its strategy
2. Analyze the various stages of the strategy development, planning, and implementation process
3. Assess internal organizational capabilities and competitive advantage
4. Examine the external environment using competitive analysis tools and recognize the need for continuous strategy assessment
5. Develop approaches to propose, plan, evaluate, and generate winning strategic options
6. Generate strategic opportunities that mix risk and reward
7. Evaluate criteria for successful partnerships, alliances, mergers, and acquisitions
8. Plan a growth strategy, and formulate an overall action plan to successfully implement your strategic initiative
9. Identify and use information sources to research and think critically about organizational strategy development
10. Communicate effectively and professionally in relation to organizational strategy.

## CONTACT INFORMATION FOR PROBLEMS OR ISSUES

- Have a **curriculum-related** question? Contact your instructor for assistance.
- Have a **technology-related** question? Contact JWMI Tech Support at (888) 596-5964 x3 or [techsupport@jwmi.com](mailto:techsupport@jwmi.com).
- Have a **student services-related** question? Contact Student Services at (703) 561-2128 or [stusupport@jwmi.com](mailto:stusupport@jwmi.com).



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### WEEKLY COURSE SCHEDULE

This 4.5 credit-hour Masters-level course is designed with the goal of having each student spend 10-15 hours (13.5 hours on average) in weekly work. This includes preparation, activities, discussions, and assignments; live or online; individual or in groups.

Week	Preparation, Activities, and Evaluation
1	<p><b>WHAT IS STRATEGY?</b></p> <p><b>Learning Outcomes</b></p> <ul style="list-style-type: none"><li>• Explore some of the popular approaches to strategy development</li><li>• Discuss the core purpose of strategy – to create a sustainable competitive advantage</li><li>• Examine Jack's 5-Slide approach to strategy</li></ul> <p><b>Weekly Materials and Readings</b></p> <ul style="list-style-type: none"><li>• Week 1 Lecture Notes</li><li>• Sherman, Chapter 1: The Origins of Modern Business Strategy Thinking</li><li>• Welch, Chapter 11: It's All in the Sauce</li><li>• Additional resources in the Weekly Materials module in Blackboard</li></ul> <p><b>Activities</b></p> <ul style="list-style-type: none"><li>• Discussion: <i>Your Experience with Strategy</i></li></ul> <p><b>Assignments</b></p> <ul style="list-style-type: none"><li>• None</li></ul>



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Week	Preparation, Activities, and Evaluation
2	<p><b>DEFINING THE PLAYING FIELD</b></p> <p><b>Learning Outcomes</b></p> <ul style="list-style-type: none"><li>• Define the playing field and the scope of the business</li><li>• Explore the use of Jack's first slide to help assess market share and opportunity</li><li>• Evaluate potential strategic initiatives against the mission and values of the organization</li></ul> <p><b>Weekly Materials and Readings</b></p> <ul style="list-style-type: none"><li>• Week 2 Lecture Notes</li><li>• Sherman, Chapter 2: There's No Such Thing as a Bad Industry</li><li>• Sherman, Chapter 3: Why Are We in Business?</li><li>• Additional resources in the Weekly Materials module in Blackboard</li></ul> <p><b>Activities</b></p> <ul style="list-style-type: none"><li>• Discussion: <i>Defining Your Playing Field</i></li></ul> <p><b>Assignment</b></p> <ul style="list-style-type: none"><li>• None</li></ul>



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Week	Preparation, Activities, and Evaluation
3	<p><b>PURSUIING THE RIGHT KIND OF GROWTH</b></p> <p><b>Learning Outcomes</b></p> <ul style="list-style-type: none"><li>• Identify the type of growth that creates sustainable competitive advantage</li><li>• Use market analysis tools to assess factors that can impact growth</li><li>• Apply the questions in Jack's second and third slides to evaluate the competitive landscape</li></ul> <p><b>Weekly Materials and Readings</b></p> <ul style="list-style-type: none"><li>• Week 3 Lecture Notes</li><li>• Sherman, Chapter 4: The Search for the Holy Grail of Business: Long-Term Profitable Growth</li><li>• Additional resources in the Weekly Materials module in Blackboard</li></ul> <p><b>Activities:</b></p> <ul style="list-style-type: none"><li>• Discussion: <i>Generating Growth</i></li></ul> <p><b>Assignments</b></p> <ul style="list-style-type: none"><li>• None</li></ul>



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Week	Preparation, Activities, and Evaluation
4	<p><b>ASSESSING RISK AND REWARD</b></p> <p><b>Learning Outcomes</b></p> <ul style="list-style-type: none"><li>• Assess risk and reward as drivers of competitive advantage</li><li>• Examine criteria to evaluate the health of an existing strategy</li><li>• Apply the questions in Jack's fourth and fifth slides to articulate threats and opportunities.</li></ul> <p><b>Weekly Materials and Readings</b></p> <ul style="list-style-type: none"><li>• Week 4 Lecture Notes</li><li>• Sherman, Chapter 5: Do You Know What Your Strategy Is?</li><li>• Additional resources in the Weekly Materials module in Blackboard</li></ul> <p><b>Activities</b></p> <ul style="list-style-type: none"><li>• Discussion: <i>Using Adverse Conditions to a Company's Advantage</i></li></ul> <p><b>Assignments</b></p> <ul style="list-style-type: none"><li>• Strategy Development Project Part 1: <i>Where to Play</i> (25% of Course Grade)</li></ul>



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Week	Preparation, Activities, and Evaluation
5	<p><b>EXPLORING STRATEGIC OPTIONS</b></p> <p><b>Learning Outcomes</b></p> <ul style="list-style-type: none"><li>• Examine different approaches for generating strategic options</li><li>• Review, refine, and socialize your initial strategy ideas</li><li>• Evaluate your ideas to identify red flags and avoid possible “traps”</li></ul> <p><b>Weekly Materials and Readings</b></p> <ul style="list-style-type: none"><li>• Week 5 Lecture Notes</li><li>• Sherman, Chapter 6: Getting Strategy Right</li><li>• Additional resources in the Weekly Materials module in Blackboard</li></ul> <p><b>Activities</b></p> <ul style="list-style-type: none"><li>• Discussion: <i>Recognizing the Need for Change</i></li></ul> <p><b>Assignment</b></p> <ul style="list-style-type: none"><li>• None</li></ul>





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Week	Preparation, Activities, and Evaluation
6	<p><b>CREATING MEANINGFUL DIFFERENTIATION</b></p> <p><b>Learning Outcomes</b></p> <ul style="list-style-type: none"><li>• Examine “meaningful differentiation” as a strategic lever</li><li>• Explore ways to identify unmet needs and untapped market segments</li><li>• Assess the market potential of new or improved solutions</li></ul> <p><b>Weekly Materials and Readings</b></p> <ul style="list-style-type: none"><li>• Week 6 Lecture Notes</li><li>• Sherman, Chapter 9: What Makes Products Meaningfully Different?</li><li>• Additional resources in the Weekly Materials module in Blackboard</li></ul> <p><b>Activities</b></p> <ul style="list-style-type: none"><li>• Discussion: <i>Strategic Growth</i></li></ul> <p><b>Assignments</b></p> <ul style="list-style-type: none"><li>• None</li></ul>



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Week	Preparation, Activities, and Evaluation
7	<p><b>IDENTIFYING GAME-WINNING MOVES</b></p> <p><b>Learning Outcomes</b></p> <ul style="list-style-type: none"><li>• Identify the most viable moves for your chosen company</li><li>• Understand how your options relate to the range of positioning categories</li><li>• Narrow your strategic options to a preferred strategy</li></ul> <p><b>Weekly Materials and Readings</b></p> <ul style="list-style-type: none"><li>• Week 7 Lecture Notes</li><li>• Sherman, Chapter 11: Strategies to Break Away from the Pack</li><li>• Additional resources in the Weekly Materials module in Blackboard</li></ul> <p><b>Activities</b></p> <ul style="list-style-type: none"><li>• Discussion: <i>Game-Winning Moves</i></li></ul> <p><b>Assignments</b></p> <ul style="list-style-type: none"><li>• None</li></ul>



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Week	Preparation, Activities, and Evaluation
8	<p><b>MERGERS, ACQUISITIONS, AND STRATEGIC ALLIANCES</b></p> <p><b>Learning Outcomes</b></p> <ul style="list-style-type: none"><li>• Explore the rationale behind forming partnerships and alliances</li><li>• Evaluate which type(s) of strategic partnerships offer the best risk-reward opportunities</li><li>• Identify critical issues in successful strategic M&amp;A or alliance activities</li></ul> <p><b>Weekly Materials and Readings</b></p> <ul style="list-style-type: none"><li>• Week 8 Lecture Notes</li><li>• Welch, Chapter 14: Deal Heat and Other Deadly Sins Welch</li><li>• Additional resources in the Weekly Materials module in Blackboard</li></ul> <p><b>Activities</b></p> <ul style="list-style-type: none"><li>• Discussion: Discussion: <i>Six Deadly Sins of M&amp;A</i> <u>or</u> <i>Strategic Alliances</i></li></ul> <p><b>Assignments</b></p> <ul style="list-style-type: none"><li>• Strategy Development Project Part 2: <i>How to Win</i> (25% of Course Grade)</li></ul>



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Week	Preparation, Activities, and Evaluation
9	<p><b>EXECUTING THE PLAN</b></p> <p><b>Learning Outcomes</b></p> <ul style="list-style-type: none"><li>• Develop, prioritize, and communicate a plan to implement your game-winning move</li><li>• Assess the forces that can undermine the new strategy</li><li>• Identify the resources needed to support the execution of your plan</li></ul> <p><b>Weekly Materials and Readings</b></p> <ul style="list-style-type: none"><li>• Week 9 Lecture Notes</li><li>• Sherman, Chapter 12: Hitting the Bull's Eye</li><li>• Additional resources in the Weekly Materials module in Blackboard</li></ul> <p><b>Activities</b></p> <ul style="list-style-type: none"><li>• Discussion: <i>Strategy Implementation</i></li></ul> <p><b>Assignments</b></p> <ul style="list-style-type: none"><li>• None</li></ul>



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Week	Preparation, Activities, and Evaluation
10	<p><b>MANAGING THE STRATEGY</b></p> <p><b>Learning Outcomes</b></p> <ul style="list-style-type: none"><li>• Recognize that strategy implementation is an ongoing, dynamic, iterative process</li><li>• Identify critical skills for actively managing strategy to achieve desired results</li><li>• Explore approaches to capture market data and evaluate changing conditions against your chosen strategy</li></ul> <p><b>Weekly Materials and Readings</b></p> <ul style="list-style-type: none"><li>• Week 10 Lecture Notes</li><li>• Additional resources in the Weekly Materials module in Blackboard</li></ul> <p><b>Activities</b></p> <ul style="list-style-type: none"><li>• Discussion: <i>Sharing Your Perspective</i></li></ul> <p><b>Assignments</b></p> <ul style="list-style-type: none"><li>• Strategy Development Project Part 3: <i>Strategy Presentation</i> (20% of Course Grade)</li></ul>
11	<p><b>Activities</b></p> <ul style="list-style-type: none"><li>• Learning Journal</li></ul>



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#### GRADING SCALE – GRADUATE

Assignment	% of Grade
Strategy Development Project Part 1 Executive Brief: Where to Play	25%
Strategy Development Project Part 2 Executive Brief: How to Win	25%
Strategy Development Project Part 3 Strategy Presentation	20%
Participation: Discussions	30%
<b>Total</b>	<b>100%</b>



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#### **Assignment 1: Where to Play: Playing Field, Competition & Your Organization**

Due Week 4, Sunday, midnight of your time zone (Weight: 25%)

#### **Introduction**

*"Find out everything that you can about the playing field.  
You should know what your competitors' salespeople eat for breakfast."*

– Jack Welch –

As the Chief Strategy Officer of your company, you have been commissioned to recommend a game-winning move that will allow your company to achieve strong revenue and profit growth and to create a sustainable competitive advantage. Although your game-winning move will not be presented to the CEO until Week 10, you have been asked to provide written executive briefs on your progress in Weeks 4 and 8.

You want to impress the CEO and your colleagues with your insights and recommendations! You know that the best way to do this is to follow Jack's logical 5-slide approach to strategy. Since there will be two interim updates, you have decided to focus your Week 4 executive brief on the Playing Field, the Competition, and Your Organization. You will focus your Week 8 executive brief on What's Around the Corner? and your Game-Winning Move. You will then synthesize your findings and recommendation into five PowerPoint slides for your presentation in Week 10. At the culmination of this three-part strategy assignment, you will have a clearly articulated and persuasive game plan to win!

#### **Instructions for Assignment 1**

Using the Assignment 1 Template, address the following:

1. **Introduction and Playing Field Description:** Provide an opening paragraph that explains the purpose of your brief, then detail the specific target segment of the market where you are choosing to compete. You should ensure the target segment is sufficiently large to achieve your company's sales and profit growth objectives, but sufficiently focused so that your company can intimately understand market characteristics and compete effectively. The template provided for this assignment guides you on how to organize relevant information, including:
  - a. Your company
  - b. The industry for your organization of choice
  - c. The market size of this industry
  - d. Specific description of the segment of this industry in which you will compete (the Playing Field)
  - e. Brief explanation of why you selected this segment.



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2. **Competitive Analysis:** In this section you will identify the **two** most formidable competitors in your playing field and address the following for each:
  - a. How big is each competitor in this target segment?
  - b. What is their most significant strength and their most significant weakness?
  - c. Briefly explain how this strength and this weakness impact their ability to compete effectively.
  - d. Does their recent performance indicate they are generally winning or losing in this playing field? Support your conclusions with data.
  - e. Has anyone (including new market entrants) introduced any game-changing new products/technology/capabilities? Have they developed (or lost) a key competitive advantage?
3. **Organizational Assessment;** In this section you will “turn the mirror around” and look inward to assess the capabilities and competencies of your chosen organization. Briefly address the following:
  - a. How big are we in this target segment?
  - b. What is our most significant strength and our most significant weakness?
  - c. Briefly explain how this strength and this weakness impact our ability to compete effectively.
  - d. Do our recent results indicate we are generally winning or losing in this playing field? Support your conclusions with data.
  - e. Have we introduced game-changing new products/technology/capabilities? Have we developed (or lost) a key competitive advantage?
4. **Key Conclusions:** Provide a succinct conclusion that captures your critical insights about the target segment and the relative competitive balance of the three companies you analyzed.
5. **References:** Include in-text citations for all data, assertions, and facts, and a corresponding reference list. Appendices are allowable if additional supplemental information is needed for the brief.

### Formatting and Submission Requirements

- Use the Assignment 1 Template to complete this assignment. Ensure you address each element of the template.
- The submitted template should be 2 to 3 pages (not including the cover page or appendixes/references page).
- Typed, single-spaced, professional font (size 10 – 12) with one-inch margins on all sides.
- Include a cover page containing the title of the assignment, your name, professor’s name, and the course title and date.
- Use and reference at least 3 external sources to support your brief. Include a references page at the end documenting sources and citations.
- You may use additional headings within the template to identify subtopics if this will improve the clarity of your template.
- You are welcome to include charts, tables, and graphs in-text or in an appendix.
- Develop and support your research with facts and in-text citations, appendixes, and references.





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#### RUBRIC: Assignment 1

Criteria	Unsatisfactory	Low Pass	Pass	High Pass	Honors
<b>1. Complete the <u>Playing Field</u> section of the template to identify and explain the size of, and rationale for, the target segment where you will compete</b>  <b>Weight: 20%</b>	<p>The Playing Field portion of the template is missing or is unsatisfactorily populated; contains inaccurate or incomplete information in two or more sections.</p> <p>Rationale for playing field selection does not provide satisfactory explanation to support the position.</p>	<p>The Playing Field portion of the template meets minimal requirements but is missing key in segmentation of the market.</p> <p>or</p> <p>lacks a complete definition of the playing field</p> <p>or</p> <p>includes only basic information on market size and segmentation</p> <p>Fails to explain conformance to the company's current competencies and operations.</p> <p>Rationale does not provide satisfactory explanation to support the position.</p>	<p>The Playing Field portion of the template is satisfactorily populated with no more than one incomplete component.</p> <p>Recommended Playing Field definition demonstrates basic ability to segment the market.</p> <p>Recommendation of Playing Field selection is appropriately sized and conforms to the company's current competencies and operations.</p> <p>Rationale is logical and is clear but may be lack conciseness or persuasiveness.</p>	<p>The Playing Field portion of the template is completely populated.</p> <p>Recommended Playing Field definition demonstrates a strong understanding of the segmentation of the market.</p> <p>Recommendation presents an appropriately sized segment and conforms to the company's current competencies and operations.</p> <p>Rationale is clear, concise, logical, and persuasive.</p>	<p>The Playing Field portion of the template is completely populated.</p> <p>Recommended Playing Field definition demonstrates exceptional understanding of the segmentation of the market</p> <p>Recommendation presents an appropriately sized Playing Field that strongly conforms to the company's current competencies and operations.</p> <p>Rationale is extremely clear, concise, logical, and persuasive.</p>
<b>2. Complete the <u>Competitor</u> sections of the template to demonstrate your knowledge of each competitor and their position in the Playing Field.</b>  <b>Weight: 30%</b>	<p>The Competitor section of the template is missing or is unsatisfactorily populated.</p> <p>Contains irrelevant or unclear content.</p>	<p>At least 6 of the 10 Competitor fields are satisfactorily populated.</p> <p>The size of one or more of the Competitors is missing and/or partially described or does not include a recognized measure of organizational size.</p> <p>Strengths and weaknesses, recent performance, or major developments are missing or do not demonstrate an understanding of how these elements affect their ability to compete.</p>	<p>At least 8 of the 10 Competitor fields are satisfactorily populated.</p> <p>The size of each Competitor is satisfactorily described and uses a recognized measure of organizational size.</p> <p>Strengths and weaknesses, recent performance, and major developments for each competitor is present but may lack insights regarding how these elements affect their ability to compete.</p>	<p>All 10 Competitor fields of the template are satisfactorily populated</p> <p>Size of each Competitor is well described with at least one relevant measure of organizational size.</p> <p>Strengths, weaknesses, recent performance, and major developments for each selected Competitor provide good insights into how these elements affect their ability to effectively compete.</p>	<p>All 10 Competitor fields of the template are completely populated.</p> <p>Size of each Competitor is exceptionally well described and may include more than one relevant measure of organizational size that can be compared against the organization and both Competitors included in the briefing.</p> <p>Demonstrates exceptional insight into the relative strengths, weaknesses, performance, and major developments of selected Competitors and how these elements affect their ability to compete.</p>

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Criteria	Unsatisfactory	Low Pass	Pass	High Pass	Honors
<b>3. Complete the <u>Our Organization</u> section of the template. Demonstrate knowledge of the company and its competitiveness in the Playing Field.</b>  <b>Weight: 20%</b>	<p>This section of the template is missing or is unsatisfactorily populated. Contains irrelevant or unclear content.</p>	<p>At least 3 of the 5 fields are satisfactorily populated.</p> <p>The size of the Organization is missing and/or partially described or does not include a recognized measure of organizational size.</p> <p>Strengths and weaknesses, recent performance, or major developments are missing or do not demonstrate an understanding of how these elements affect the organization's ability to compete.</p>	<p>At least 4 of the 5 fields are satisfactorily populated.</p> <p>Organizational size is satisfactorily described and uses a recognized measure of organizational size.</p> <p>Strengths and weaknesses, recent performance, and major developments for the company is present but may lack insights regarding how these elements affect their ability to compete.</p>	<p>All fields of the template are satisfactorily populated.</p> <p>Organizational size is well described with at least one relevant measure of organizational size.</p> <p>Strengths, weaknesses, recent performance, and major developments of the company provide good insights into how these elements affect its ability to effectively compete.</p>	<p>All fields of the template are completely satisfactorily populated.</p> <p>Organizational size is exceptionally well described and may include more than one relevant measure of organizational size that can be compared to the size of the competitors included in the briefing.</p> <p>Demonstrates exceptional insight into the relative strengths, weaknesses, performance, and major developments of the company and how these elements affect its ability to compete.</p>
<b>4. Provide an effective and persuasive conclusion that is "fit for use" for a CEO.</b>  <b>Weight: 15%</b>	<p>The conclusion is missing or is an unsatisfactory distillation of the template that does not provide a sufficient level of strategic insights and conclusions.</p>	<p>The conclusion is a partial distillation of the template with some important and relevant strategic insights and conclusions.</p>	<p>The conclusion is a satisfactory distillation of the template with important and relevant strategic insights and conclusions.</p> <p>The assertions may lack some clarity or conciseness and/or may not be highly persuasive.</p>	<p>The conclusion is a very good distillation of the template with important and relevant strategic insights and conclusions and is presented succinctly and persuasively to the CEO.</p> <p>The conclusion does not include extraneous data that would not be relevant or important to the CEO.</p>	<p>The conclusion is an excellent distillation of the template with important and relevant strategic insights and conclusions and is presented succinctly and persuasively to the CEO.</p> <p>The conclusion does not include extraneous data that would not be relevant or important to the CEO.</p>



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Criteria	Unsatisfactory	Low Pass	Pass	High Pass	Honors
<b>5. Present information professionally within the three-page limit, and support recommendations, assertions, and facts with in-text citations, appendixes, and references.</b>  <b>Weight: 15%</b>	<p>Executive Brief lacks a professional appearance and/or contains multiple spelling or grammatical and mechanical usage errors.</p> <p>Most recommendations, assertions, and facts are not supported with in-text citations, appendixes, and references.</p>	<p>Executive Brief is satisfactory in appearance.</p> <p>Has a few grammatical and mechanical usage errors that make parts of the text difficult for the reader to understand.</p> <p>Some recommendations, assertions, and facts are supported with in-text citations, appendixes, and references.</p>	<p>Executive Brief is well-written and generally professional in appearance.</p> <p>May contain minor grammatical and mechanical usage errors, but these do not have a major impact on the flow or clarity.</p> <p>Most recommendations, assertions, and facts are supported with in-text citations, appendixes, and references.</p>	<p>Executive Brief is succinct and well-written and within the three-page limit (excluding cover, references, and appendixes) and professional in appearance.</p> <p>Grammatical and mechanical usage errors, if any, are minor and have no impact on the flow.</p> <p>Nearly all of recommendations, assertions, and facts are supported with in-text citations, appendixes, and references.</p>	<p>Executive Brief is succinct and well-written and within the three-page limit (excluding cover, references, and appendixes) and very professional in appearance.</p> <p>There are no grammatical or mechanical usage errors.</p> <p>All recommendations, assertions, and facts are exemplarily supported with in-text citations, appendixes, and references.</p>



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#### **Assignment 2: How to Win: Strategic Options Assessment and Recommendation**

Due Week 8, Sunday, midnight of your time zone (Weight: 25%)

#### **Introduction**

*“Strategy means making clear-cut choices about how to compete. You cannot be everything to everybody, no matter what the size of your business or how deep its pockets.”*

– Jack Welch –

Congratulations! In your first executive brief, you generated some great insights about the playing field and competitors and how your own organization stacks up. Now you will transition from looking back to looking ahead. You will develop your “How to Win” strategy that will feature your game-winning move!

Your CEO has clarified that you need to think expansively and recommend a move that is *transformative* rather than *incremental*. To help with this, you have decided to consider each of the seven common winning moves outlined in the Week 6 Lecture Notes and pick one of them as your preferred game-winning move.

You know that your game-winning move will be a decisive choice for the company. But in choosing this move (as is the case with any strategic initiative), the company will risk money and resources. If your move is the right one, you will grow sales and profits and beat your competitors. If your move is the wrong one, you risk disappointing your investors and letting your competitors gain competitive advantage. Given the importance of this decision, you will evaluate *each* of the seven common winning moves and then do a deep dive into the attractiveness, feasibility and risks of your chosen strategy.

Your CEO is expecting your second executive brief in Week 8 to summarize your analysis of the strategy you believe offers the most potential and your recommendation for the game-winning move that you will be presenting in Week 10.

#### **Instructions for Assignment 2**

Your objective is to create a game-winning move, not just evaluate other people’s moves. For this assignment, do NOT recommend a move that is identical or very similar to a real-life move made by your company. For example, don’t recommend that Tesla/Apple/Google/Uber/etc. invest in self-driving car technology or recommend that CVS acquire Aetna as those are all in the public domain. Instead, recommend a move that is novel and innovative for your company.



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Craft your second executive brief to include the following:

1. An opening paragraph summarizing the **purpose and content** of the brief.
2. **Rank Order Your Three Top Moves:** Review the applicability and attractiveness of each of the 7 common winning moves (from the Week 6 Lecture Notes) for your organization and your competitive situation in your chosen playing field. List your top three most attractive moves in order from most attractive to least attractive.
3. **Detail your Recommended Move:** For your most attractive move, provide details about what you would recommend as a part this move. For example, if you chose acquisition, who might you buy? If you chose geographic expansion, where would you expand? If you chose discontinuous innovation, what would the innovation be? Explain why you think it will generate financially attractive growth (which includes both incremental revenue growth and commensurate incremental profit growth).
4. **Alignment of the Move to Organizational Strength and Weakness.** How does this move address your key strength/weakness identified in your playing field assessment from Assignment 1?
5. **Required Investments.** Most strategic initiatives require an investment of resources and money. What are some significant investments that would be necessary to implement this move? Note, we are not looking for dollar figures; instead, we are looking for the key categories of investments such as hiring people, investing in new capabilities, building new manufacturing plants, etc.
6. **Risks and Risk Mitigation.** Most game-changing moves are bold initiatives and have risks that need to be considered. What are the most significant risks and what is your recommended risk-mitigation plan?
7. **Competitive Response:** How do you think the competition will react to your move?
8. **Concluding statement.** Conclude with a brief a summary of your game-winning move and conclusions on the above topics. Consider how the move effectively balances investments and risks. How will the move position your company against the competition?
9. **References:** Include in-text citations for all data, assertions, and facts, and a corresponding reference list. Appendices are allowable if additional supplemental information is needed for the brief.



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#### Formatting and Submission Requirements

- The executive brief submission should be 2 to 3 pages (not including the cover page or appendixes/references page).
- Typed, single-spaced, professional font (size 10 – 12) with one-inch margins on all sides.
- Include a cover page containing the title of the assignment, your name, professor's name, and the course title and date.
- Include a references page at the end documenting sources and citations used. You must cite three or more current sources.
- Use headings to identify main topics and subtopics.
- You are welcome to include charts, tables, and graphs in-text or in an appendix.
- Develop and support your research with facts and in-text citations, appendixes, and references.



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#### RUBRIC: Assignment 2

Criteria	Unsatisfactory	Low Pass	Pass	High Pass	Honors
<b>1. Describe and rank three the top potential game winning moves and recommend a preferred game-winning move.</b>  <b>Weight: 30%</b>	Does not provide any ranking and/or unsatisfactorily describes a recommended move and how it might generate financially attractive growth for the company.	<p>Does not include a move ranking and/or is missing a ranked option.</p> <p>Partially describes recommended move.</p> <p>A basic explanation for how the move might generate financially attractive growth for the company is provided; however, the move lacks sufficient detail that impacts two of the three areas: clarity, feasibility, or logic.</p>	<p>The 3 moves are ranked and satisfactorily described.</p> <p>Recommended move is identified and how it will generate financially attractive growth is satisfactorily explained; however, there is a lack of detail in one of the three areas: clarity, feasibility or logic.</p>	<p>The 3 moves are well described and clearly ranked.</p> <p>Recommended move has well-articulated specificity to provide a clear understanding of how the move will generate financially attractive growth for the company.</p> <p>The move is reasonably clear, logical and feasible</p>	<p>The 3 moves are exceptionally well described.</p> <p>Recommended move is innovative and presented in a clear and unambiguous way.</p> <p>Excellent rationale for how the move will generate financially attractive growth for the company.</p> <p>The move is clear logical and feasible</p>
<b>2. Explain the alignment of recommended move to a core company strength and weakness and identify necessary Investments</b>  <b>Weight: 20%</b>	Does not include or unsatisfactorily explains how the move relates to the company's strength and weakness or does not identify significant investments that will be required.	<p>Partially explains how the move relates to the company's strength and weakness.</p> <p>May include a basic description of investment but lacks more than one important investment category.</p>	<p>Satisfactorily explains how the move relates to the company's strength and weakness.</p> <p>Provides satisfactory description of some of the significant investments that will be required but may be missing at least one important investment category.</p>	<p>Clearly and concisely explains how the move relates to the company's strength and weakness.</p> <p>Demonstrates sound logic and reasoning regarding most of the significant investments that will be required.</p>	<p>Clearly and concisely explains how the move relates to the company's strength and weakness.</p> <p>Demonstrates excellent logic, reasoning and foresight about the most significant investments that will be required.</p>



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Criteria	Unsatisfactory	Low Pass	Pass	High Pass	Honors
<b>3. Identify risks and anticipated competitive response</b>  <b>Weight: 20%</b>	<p>Does not include, or unsatisfactorily demonstrates anticipation of the most significant risks of the move</p> <p>or</p> <p>Does not include risk mitigation plans for the identified move.</p> <p>Unsatisfactorily anticipates competitive response.</p>	<p>Explains at least one risk associated with the move but these risks may be lacking in detail or logic.</p> <p>Risk mitigation plans may not be complete, logical, or aligned with the risks.</p> <p>Competitive response predictions partially address the likely outcomes but are overly vague.</p>	<p>Clearly explains at least two risks of the move.</p> <p>Provides logical risk mitigation plans for at least one of the identified risks.</p> <p>Competitive response predictions are reasonable and include an acceptable amount of detail.</p>	<p>Clearly and logically explains most of the significant risks of the move.</p> <p>Provides cogent and novel risk mitigation plans for most of the identified risks.</p> <p>Competitive response predictions demonstrate sound logic and are clearly explained.</p>	<p>Clearly and logically explains the most significant risks of the move.</p> <p>Provides cogent and novel risk-mitigation plans to address each identified risk.</p> <p>Competitive response predictions demonstrate exemplary logic and reasoning and are clearly explained.</p>
<b>4. Provide an effective and persuasive conclusion that is "fit for use" for a CEO.</b>  <b>Weight: 15%</b>	<p>Conclusion is missing or presents an unsatisfactory summary of the move, risks, and investments.</p>	<p>Conclusion partially summarizes the move and partially addresses other factors of risks and investments.</p>	<p>Conclusion is a satisfactory synopsis of the key elements of the move and satisfactorily asserts the recommended move while simultaneously providing some perspective on risks and/or investments.</p>	<p>Conclusion presents a complete and succinct synopsis of the move and persuasively asserts the recommended move while simultaneously providing a reasonable, fair and balanced position on investments and risks.</p>	<p>Conclusion is extremely well crafted and provides a clear and succinct synopsis of the move.</p> <p>Persuasively asserts the recommended move while providing a reasonable fair and balanced position on investments and risks.</p> <p>Excised from the brief, the conclusion could effectively be used as the elevator pitch for the move.</p>





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Criteria	Unsatisfactory	Low Pass	Pass	High Pass	Honors
<b>5. Present information professionally within the three-page limit, and support recommendation, assertions, and facts with in-text citations, appendixes, and references.</b>  <b>Weight: 15%</b>	Brief is missing significant content or is generally unprofessional in appearance due to multiple grammatical and mechanical usage or spelling errors.  Most recommendations, assertions, and facts are not supported with in-text citations or references.	Brief is partially well-written and professional in appearance.  Has several grammatical and mechanical usage or spelling errors that make parts of the text difficult for the reader to understand.  Some recommendations, assertions, and facts are supported with in-text citations and references.	Brief is well-written and generally professional in appearance.  Conforms to page-limit and formatting requirements  There may be a few grammatical and mechanical usage errors, but they do not have a major impact on the flow.  Most of the recommendations, assertions, and facts are supported with in-text citations and references.	Brief is succinct and well-written and professional in appearance.  Conforms to page-limit and formatting requirements  Grammatical and mechanical usage errors, if any, are minor and have no impact on the flow.  The majority of recommendations, assertions, and facts are supported with in-text citations and references.	Brief is succinct and exceptionally well-written and professional in appearance.  Conforms to page-limit and formatting requirements  There are no grammatical and mechanical usage errors.  All recommendations, assertions, and facts are exemplarily supported with in-text citations and references.



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### **Assignment 3: Strategy Presentation**

Due Week 10, Sunday, midnight of your time zone (Weight: 20%)

#### **Introduction**

*"In order for strategy to be effective, it has to be clearly communicated. Everybody in the organization has to understand why we are doing what we're doing, and what they need to do in order to execute the strategy."*

– Jack Welch –

Time to Shine! You've done the hard work to evaluate the playing field and competition. You've looked at seven potential strategic moves and assessed the pros and cons of each. Finally, you have arrived at the game-winning move that can help your company beat competitors, generate significant shareholder value and create a sustainable competitive advantage. All you need now is a "yes" from your CEO!

You know that one of the most important skills leaders must develop is the ability to sell their ideas. They need to understand their audience, craft their presentation appropriately, have poise, and communicate clearly. They also need to show their passion and demonstrate executive presence!

You know your CEO's time is valuable and you have only five minutes to "sell" your game-winning move and explain the key rationale. You will synthesize your previous executive briefs to create a succinct, well-organized presentation based on Jack's 5 slides and then present these during your five-minute slot.

The presentation is focused on selling the move and your rationale – and this probably means that some of the slides are going to be more important than others. Your CEO wants you to touch on each slide during the 5-minute presentation but doesn't mind if you spend only a brief amount of time on some slides and more time on others.

You have a great game-winning move. You have been perfecting your executive presence. You have confidence. You are ready to impress!

#### **Instructions**

1. Distill the work you have done in Assignments 1 and 2 to create a 5-slide strategy deck. This is explained in Chapter 11 of *Winning* and is also included in summary form below.

Be aware that information needed for some of Jack's questions would be available to a company's strategy team leader but may not be in the public domain for our use. Therefore, your content in each slide will primarily be derived from your research for your first two assignments. This may mean that you focus on answering some of Jack's questions, but perhaps not all of them.



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2. You should approach your presentation from a senior executive perspective, with your intended audience being the CEO of the company. Your presentation should be both informative and inspirational. Your goal is to persuade the CEO to support your strategic plan.
3. You should assume that the CEO has already read your two executive briefs. However, you are unsure whether there is support or skepticism for of your game-winning move. Thus, you need to focus on “selling your strategy” and not just regurgitating your first two assignments. Your CEO will be compelled by an enthusiastic presentation that explains why your game-winning move is the right one, but that also presents a balanced, cogent understanding of the risks involved.
4. Your presentation should have a professional look and feel. It should demonstrate your executive presence through professional dress, eye contact, clear and confident speech and body language. Think about Jack’s “4 E’s + 1 P” as you prepare, and use this as a guide for your delivery.

### Formatting and Submission Requirements

- Record your presentation using Zoom This will allow you to record your use of a PPT deck and webcam at the same time. Recording instructions and samples: <https://www.kaltura.com/tiny/xgw5h>
- Keep your presentation within a 4- to 6-minute timeframe.
- You may only present slides from Jack’s 5-slide methodology, and you must present all 5 slides. However, you are not required to allocate your time equally on to each of the 5 slides. Instead, spend your time on the slides that best enable you to convincingly sell your game-winning move. There are many tactics that allow you to briefly cover a slide that is not essential to sell your move. An example is to quickly flash the competition slide while noting, “*You are well aware that our two key competitors are Ford and GM, and I shared their recent moves in the executive brief, so I’d instead like to advance to the Our Organization slide*”.
- Submit your Zoom video in mp4 format only. Note: Zoom offers several formats, so make sure you save to your computer and then upload only the mp4 formatted version.
- You do not need to submit a separate PPT file for grading because each slide should be visible in your Zoom video.



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#### **5-Slide Methodology Questions**

Slide questions are not set in stone. Focus your content on the most important and relevant questions for your company and industry. You are not expected to incorporate every bullet under each slide as part of your five-slide presentation. Instead, choose the most compelling elements that help you tell the most persuasive story.

##### **Slide 1: What the Playing Field Looks Like Now**

- Who are the competitors in this business, large and small, new and old?
- Who has what share globally, and in each market? Where do we fit in?
- What are the characteristics of this business? Is it a commodity, high value, or somewhere in between? Is it long cycle or short? Where is it on the growth curve? What are the drivers of profitability?
- What are the strengths and weaknesses of each competitor? How good are its products? How much does each spend on R&D? How big is each sales force? How performance-driven is each culture?
- Who are this business's main customers, and how do they buy?

##### **Slide 2: What the Competition Has Been Up To**

- What has each competitor done in the past year to change the playing field?
- Has anyone introduced game-changing new products, new technologies, or new distribution channels?
- Are there any new entrants, and if so, what have they been up to in the past year?

##### **Slide 3: What You've Been Up To**

- What have you done in the past year to change the competitive playing field?
- Have you bought a company, introduced a new product, stolen a competitor's key salesperson, or licensed a new technology from a startup?
- Have you lost any competitive advantages that you once had – a great salesperson, a special product, a proprietary technology?

##### **Slide 4: What's Around the Corner?**

- What scares you most in the year ahead – what are one or two things a competitor could do to nail you?
- What new products or technologies could your competitors launch that might change the game?
- What M&A deals made by a competitor would knock you off your feet?

##### **Slide 5: What's Your Winning Move?**

- What can you do to change the playing field – is it an acquisition, a new product, globalization?
- What can you do to make customers stick with you more than ever before and be more loyal to you than to anyone else?
- Persuasively and logically present your “winning move”



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#### RUBRIC: Assignment 3

Criteria	Unsatisfactory	Low Pass	Pass	High Pass	Honors
<b>1. The 5 slides include the most important key findings and analyses and insights and are professional in appearance.</b>  <b>Weight 50%</b>	<p>The 5 slides are not satisfactory in content and do not satisfactorily support the presentation.</p> <p>Two or more slides might be missing or not fully developed.</p> <p>There may be a lack of alignment with the slide content and the student's narration.</p> <p>The slide design may distract from, rather than enhance, the student's presentation.</p>	<p>The 5 slides meet minimum content requirements.</p> <p>Appearance is professional but only partially supports the presentation.</p> <p>No more than one slide is missing underdeveloped, or not aligned with the narration.</p> <p>The slides may not significantly enhance the student's presentation.</p>	<p>The 5 slides have satisfactory content and are professional in appearance.</p> <p>They support the presentation by illuminating key facts and insights and are graphically interesting.</p> <p>No slides are missing, underdeveloped, or not aligned with the narration. The slides are generally effective in enhancing the student's narration</p>	<p>The 5 slides have very good content and are professional in appearance.</p> <p>They provide an excellent support for the presentation by illuminating key facts and insights and are graphically interesting.</p> <p>All slides are well developed, with good content, and enhance the student's narration.</p>	<p>All 5 slides are exemplary in content, professional in appearance, and exceptionally well aligned to the presentation. They illuminate key facts and insights and are graphically interesting.</p> <p>All slides are well designed and fully developed, with excellent content, and effectively enhance the student's narration.</p>
<b>2. Persuasively and logically present the "Game-Winning Move."</b>  <b>Weight 20%</b>	<p>Missing or unsatisfactory presentation of the game-winning move.</p>	<p>Presentation of the game-winning move is lacking in some regard.</p> <p>It may not be fully defined or persuasively sold.</p>	<p>Satisfactory presentation of the game-winning move.</p> <p>The student's narration and the game-winning move slide may complement each other but the move may lack details regarding the viability, importance, or urgency.</p> <p>Presents information in a satisfactory manner but may only partially consider the balance of risks and rewards.</p>	<p>Logical and persuasive presentation of the game-winning move.</p> <p>The student's narration and the game-winning move slide complement each other and support a clear plan of action. The presentation demonstrates a reasonable degree of importance and urgency around the game-winning move.</p> <p>Presents information appropriate for a CEO, effectively sells the move, and manages to persuade the CEO while providing reasonable balance of risk and reward.</p>	<p>Excellent presentation of the game-winning move.</p> <p>The student's narration and the game-winning move slide complement each other and contribute to a highly persuasive, logical, and clear plan of action. The presentation demonstrates a high degree of both importance and urgency around the game-winning move.</p> <p>Presents information appropriate for a CEO, effectively sells the move while providing clear balance of risk and reward.</p>

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Criteria	Unsatisfactory	Low Pass	Pass	High Pass	Honors
<b>3. Executive Presence</b>  <b>Weight 20%</b>	<p>Demonstrates unsatisfactory presentation skills or does not include a video component with the assignment thus preventing the rating of executive presence.</p>	<p>Demonstrates marginal presentation skills; lacks confidence, poise, professional dress, appropriate background, consistent eye contact with the camera.</p> <p>Voice is monotone, verbal cues are poorly applied.</p> <p>Sound and lighting are inadequate to provide good video quality.</p> <p>Narration does not fully enhance the slide content, or it is largely a word-for-word duplication of the content presented on the slides.</p>	<p>Demonstrates satisfactory presentation skills regarding confidence and poise, professional dress, appropriate background, consistent eye contact with the camera.</p> <p>Voice is dynamic, and verbal cues are satisfactorily applied.</p> <p>Sound and lighting are sufficient to provide good video quality.</p> <p>Narration may add additional details to the slide content.</p>	<p>Demonstrates good Executive Presence that includes confidence and poise, professional dress, appropriate background, consistent eye contact with the camera.</p> <p>Voice is dynamic, and verbal cues are consistently applied.</p> <p>Sound and lighting are very good and provide good video quality.</p> <p>Narration does not just replicate the slides, or sound like it is being read from a script.</p>	<p>Delivers a presentation with exceptionally strong Executive Presence.</p> <p>Demonstrates confidence, poise, professional dress, appropriate background, consistent eye contact with the camera.</p> <p>Voice is quite dynamic, and verbal cues are exemplarily.</p> <p>Sound and lighting are excellent to provide high-quality video.</p> <p>Narration is highly engaging and enhances the slide content by supplementing the slides and not reading from a script.</p>
<b>4. The presentation is within the 4- to 6-minute timeframe.</b>  <b>Weight: 10%</b>	<p>The video is more than 3 minutes over or under the 4- to 6-minute time limit.</p>	<p>The video is more than 2 minutes over or under the 4- to 6-minute time limit, but no more than 3 minutes.</p>	<p>The video is more than 1 minute over or under the 4- to 6-minute time limit, but no more than 2 minutes.</p>	<p>The video is slightly over or under the 4- to 6-minute time limit, but by no more than 1 minute.</p>	<p>The video adheres to the 4- to 6-minute time limit.</p>