



WELCOME

Congratulations and welcome to the final course in your MBA program at the Jack Welch Management Institute. You made it! Undoubtedly, there were a lot of late nights, tough assignments, and possibly even a moment or two when you wondered whether you made the right decision to go back to school to earn this degree. When you began your leadership journey at JWMI with *JWI 510: Leadership in the 21st Century*, you were asked to reflect on your own leadership styles and practices. You progressed through that course and those that followed by exploring numerous subjects (Finance, Operations, People Management, etc.) through a “leadership lens.” Now, you’re ready to pull all those pieces together and have some fun as we elevate that lens even further – to investigate challenges and opportunities facing an organization through the “CEO Mindset.”

COURSE DESCRIPTION

This course is where it all comes together. Students will synthesize and apply all they have learned during their JWMI MBA program. They will complete a Capstone Project in which they will prepare and present a well-researched strategic plan to take their organization to a more profitable and sustainable position of market leadership. Because business leaders, especially CEOs, cannot just act on hunches, the first half of this course will be focused on business analytics. This will include an overview of powerful quantitative strategies and techniques used to analyze business data in any organization and improve decision making and outcomes across all business functions. Students will use these same techniques to identify, collect, and analyze the data needed to support their strategic plan.

COURSE MISSION AND OVERVIEW

The mission of JWI 599 is to prepare students to develop effective strategic plans by introducing them to the concepts of business analytics needed to make sound, data-driven business decisions. By leveraging these tools, along with other skills developed throughout the program, students will prepare and deliver a board-level presentation seeking approval for a mission-critical initiative to add value to their chosen organization.

This course leverages everything you have learned at JWMI.

- You will select an organization that is of interest to you and is relevant to your career, and then develop a plan to implement a strategy that will take the organization forward.
- You will approach the subject matter and assignments in this course from the perspective of the senior-most leader in the organization, and you will use the tools of business analytics and leadership to create a plan that addresses the strategic, financial, managerial, and organizational issues in your chosen organization.
- Your plan will culminate in the delivery of a recorded presentation in which you, as the leader of your



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selected organization, share your vision and outline your plan to the Board of Directors in order to secure the support needed to implement your proposed changes.

- Your presentation will require that you not only demonstrate a sound grasp of proven leadership and management practices and a thorough analysis of the organization you selected, but that you deliver your message with a compelling executive presence.

Successfully completing this course and the Capstone Project will demonstrate your ability to analyze, interpret, synthesize, and communicate with a “CEO mindset.”

THE USE OF BUSINESS ANALYTICS IN THIS COURSE

Business leaders cannot just act on hunches. They must have facts and data to support their actions. They must understand the “stories” that numbers tell and how these insights enable them to run their organizations better.

While “speaking with data” is central to finance strategy, it is often underappreciated in other areas of management and leadership. This course reminds us of the importance of quantitative data and explores the tools needed to solve complex business problems. The primary role of data analysis when applied to business management is to shine a light on patterns, trends, and anomalies to help uncover opportunities and threats that can impact the business.

Our objective is not to turn you into professional data analysts. It is to help you ask better questions and leverage key data, so that you can make better decisions and drive meaningful initiatives that will improve the performance of your organization.

In completing your Capstone Project, you will utilize several tools of data collection and analysis. A key medium for this will be the Discussion Questions each week that are tied to both the core readings in the course and to the problem/opportunity you selected for your Capstone Project.

EXPLANATION OF ROLES IN THIS COURSE

This course is unlike your previous courses at JWMI in that you will speak in “in character” in all discussions and assignments. Specifically, this means:

1. Starting with your initial post in the Week 1 discussion and continuing throughout every original discussion post and each part of the Capstone Project, you are to speak in the first-person singular as the senior-most leader guiding your organization to a stronger future.
2. When replying to your classmates’ discussion posts, you will assume the role of a member of their Board of Directors, a guiding coalition, or other advisory board. Your job is to probe and



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appropriately challenge assumptions and assertions made by these leaders to help them explore more deeply the issues that will drive their organizations' success. Simply repeating or affirming what the CEO states is not enough to earn HONORS.

3. The **Instructor** for this course will serve as your mentor.
 - i. Her/his role is to guide discussions through asking insightful questions and encouraging students to explore topics, ideas, and assumptions they may not have considered.
 - ii. Unlike your previous JWMI courses, the instructor should *not* be viewed as a subject matter expert in all content areas, but rather as a facilitator for this part of your leadership development journey.
 - iii. Finally, since the instructor will not necessarily have deep prior knowledge of the organization you have selected, grading and feedback will be focused on assessing whether you have reviewed, filtered, and analyzed the most relevant data, and whether you have leveraged your leadership and management skills to “cut through the clutter” and get at what really matters – just as a good leader must. Synthesizing all you have learned is key to creating realistic solutions to the challenges and opportunities that your organization faces.



COURSE STRUCTURE

The course will focus on the identification of key strategic opportunities and the collection and analysis of data needed to frame problems and develop strategies. The tools you explore will be central to the development and presentation of a plan to strengthen your chosen organization's competitive position.

Theme	Weekly Topics	Key Content
Foundations of Business Analytics	1. The Role of Data in Strategic Leadership	Our course begins with an overview of business analytics and the importance of using data to address complex challenges in business. We learn why today's leaders expect to see recommendations for action that are based on a thorough analysis of relevant data.
	2. Framing the Problem/Opportunity	We examine what it takes to frame a business problem accurately and concisely so that you can determine <i>what</i> data you will need to gather and <i>how</i> this information might inform your decision making process.
	3. Gathering and Organizing Data	This week is focused on tools and techniques to help you organize raw data into meaningful categories and groupings that can be easily understood.
From Analysis to Story	4. Leveraging Data to Drive Change	Over the next two weeks, we apply tools to analyze data and turn it into usable information that clearly highlights patterns, trends, and anomalies.
	5. Focusing on What Matters Most	We continue our exploration of tools and best practices to highlight critical information using charts, tables, and other graphics to ensure your data story is clear and well-focused.
Implementing Your Plan	6. Aligning Strategy and Mission	Over the next four weeks, you will apply principles and tools from your JWMI program to refine your strategic initiative and ensure you have addressed the mission-critical elements needed to implement your plan.
	7. Calculating Costs and Return on Investment	This week, you will apply the financial skills you have learned to develop forecasts and calculate the projected return on investment to ensure your strategic initiative will strengthen the financial health of the organization.
	8. People Management	You will review key concepts in people management to develop a "people plan" for your initiative.
	9. Operational and Organizational Change	In final preparation for the submission of your Capstone Project, you will review principles of change leadership to ensure you have addressed all critical business processes and are prepared to lead this change.
Board Presentation	10. Winning	During the final week of the course, you will present your Capstone Project to your Board of Directors.



INSTRUCTIONAL MATERIALS

Required Resources

- Duarte, Nancy (2019). *DataStory: Explain Data and Inspire Action Through Story*, USA: IdeaPress Publishing.
- Weekly articles and videos provided within the course.
- Welch, J. & Welch, S. (2005) *Winning*. New York: HarperCollins.

Optional Hard Copy Text

- Davenport, T. H. & Kim, J. (2013). *Keeping Up with the Quants: Your Guide to Understanding and Using Analytics*. Boston, MA: Harvard Business Press.¹

NOTE: Your course textbook, [Keeping Up with the Quants: Your Guide to Understanding and Using Analytics](#), is also available in the University Library. Please follow the steps [here](#) to download PDF Chapters of this eBook.

Additional Resources

- Textbooks, articles, and other resources utilized in previous JWMI courses have been included to support your review of key content areas.

¹ **Note:** For your convenience, required chapters of the Davenport text are provided as PDFs in the course readings, so you do not have to buy the hard copy version of the book.



COURSE LEARNING OUTCOMES

1. Develop habits of quantitative thinking, including framing a problem and predicting potential results.
2. Describe how to gather and analyze relevant data and interpret results.
3. Formulate and communicate actionable recommendations based on data interpretations and insights.
4. Conduct a strategic analysis of a selected company, its industry, and its competitors.
5. Apply business concepts and skills learned throughout the MBA program.
6. Explain how the organizational challenge(s) impacts long-term organizational sustainability, profitability, and growth.
7. Develop a leadership strategy that effectively addresses the organization's challenge and a compelling approach for executing the strategy.
8. Deliver a persuasive pitch to key stakeholders using communication and presentation best practices.

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.
- Have a student services-related question? Contact Student Services at (703) 561-2128 or stusupport@jwmi.com



COURSE OUTLINE

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

Week	Preparation, Activities, and Evaluation
1	<p>THE ROLE OF DATA IN STRATEGIC LEADERSHIP</p> <p>Learning Outcomes</p> <ul style="list-style-type: none">• Define business analytics and explain its use in decision making• Understand the importance of adopting the CEO Mindset in strategic planning• Explore critical factors in defining the scope and focus of strategic initiatives <p>Weekly Materials and Readings</p> <ul style="list-style-type: none">• Davenport & Kim, Ch. 1: Why Everyone Needs Analytical Skills• Duarte, Introduction• Additional Resources in the Weekly Materials module in Blackboard <p>Activities</p> <ul style="list-style-type: none">• Discussion: <i>Choose a Focus Area for Your Capstone Project</i>• Live Success Session <p>Assignments</p> <ul style="list-style-type: none">• None

Week	Preparation, Activities, and Evaluation
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2	<p>FRAMING THE PROBLEM/OPPORTUNITY</p> <p>Learning Outcomes</p> <ul style="list-style-type: none">• Frame a business problem/opportunity• Review previous findings that relate to the problem/opportunity• Identify relevant data needed to formulate a testable hypothesis <p>Weekly Materials and Readings</p> <ul style="list-style-type: none">• Davenport & Kim, Ch. 2: Framing the Problem• Duarte, Ch. 1: Becoming a Communicator of Data• Duarte, Ch. 2: Communicating to Decision-Makers• Additional Resources in the Weekly Materials module in Blackboard <p>Activities</p> <ul style="list-style-type: none">• Discussion: <i>Select your Organization and Frame the Problem/Opportunity</i>• Live Success Session• CEO Chat Session <p>Assignments</p> <ul style="list-style-type: none">• None
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Week	Preparation, Activities, and Evaluation
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3	<p>GATHERING AND ORGANIZING DATA</p> <p>Learning Outcomes</p> <ul style="list-style-type: none">• Gather data needed to evaluate the problem/opportunity you framed• Organize data into meaningful categories and groupings• Select an analytical method to assess your data <p>Weekly Materials and Readings</p> <ul style="list-style-type: none">• Davenport & Kim, Ch.3: Solving the Problem• Duarte, Ch.3: Crafting a Data Point of View• Additional Resources in the Weekly Materials module in Blackboard <p>Activities</p> <ul style="list-style-type: none">• Discussion: <i>Gathering and Organizing Your Data</i>• Live Success Session• CEO Chat Session <p>Assignments</p> <ul style="list-style-type: none">• Assignment 1: <i>Framing the Problem</i> (Due: Sunday, midnight of Week 3)
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Week	Preparation, Activities, and Evaluation
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<p>4</p>	<p>LEVERAGING DATA TO DRIVE CHANGE</p> <p>Learning Outcomes</p> <ul style="list-style-type: none">• Explore the importance of crafting a clear storyline for data presentations• Examine data analysis tools that can uncover patterns, trends, and anomalies• Determine which types of analysis work best for particular types of data <p>Weekly Materials and Readings</p> <ul style="list-style-type: none">• Duarte, Ch. 4: Structuring an Executive Summary as a Data Story• Duarte, Ch. 5: Creating Action Through Analytical Structure• Additional Resources in the Weekly Materials module in Blackboard <p>Activities</p> <ul style="list-style-type: none">• Discussion: <i>Turning Data into Information</i>• Live Success Session• CEO Chat Session <p>Assignments</p> <ul style="list-style-type: none">• None
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Week	Preparation, Activities, and Evaluation
5	<p>FOCUSING ON WHAT MATTERS MOST</p> <p>Learning Outcomes</p> <ul style="list-style-type: none">• Review your data to identify the most critical information in addressing your problem/opportunity• Explore tools and techniques to display your data• Create visual representations to communicate your data story to decision makers and non-technical audiences <p>Weekly Materials and Readings</p> <ul style="list-style-type: none">• Davenport & Kim, Ch. 4: Communicating and Acting on Results• Duarte, Ch. 6: Choosing Charts and Writing Observations• Duarte, Ch. 7: Annotating Insights onto Charts• Additional Resources in the Weekly Materials module in Blackboard <p>Activities</p> <ul style="list-style-type: none">• Discussion: <i>Refining Your Data Story</i>• Live Success Session• CEO Chat Session <p>Assignments</p> <ul style="list-style-type: none">• Assignment 2: <i>Data Analysis</i> (Due: Sunday, midnight of Week 5)

Week	Preparation, Activities, and Evaluation
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6	<p>ALIGNING STRATEGY AND MISSION</p> <p>Learning Outcomes</p> <ul style="list-style-type: none">• Confirm that your market research and data analysis support your testable hypothesis• Ensure your strategic initiative aligns with the mission of the organization• Begin work on the implementation plan for your strategic initiative <p>Weekly Materials and Readings</p> <ul style="list-style-type: none">• Review Materials from JWI 518 and JWI 540• Additional Resources in the Weekly Materials module in Blackboard <p>Activities</p> <ul style="list-style-type: none">• Discussion: <i>Defining Your Strategy</i>• Live Success Session• CEO Chat Session <p>Assignments</p> <ul style="list-style-type: none">• None
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Week	Preparation, Activities, and Evaluation
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7	<p>DETERMINING COSTS AND RETURN ON INVESTMENT</p> <p>Learning Outcomes</p> <ul style="list-style-type: none">• Review available financial data for your chosen organization, competitors, and market• Evaluate the metrics that are most relevant to your strategic initiative• Apply techniques of forecasting to develop a cost-benefit analysis of associated costs and payback <p>Weekly Materials and Readings</p> <ul style="list-style-type: none">• Review materials from JWI 530 and JWI531• Additional Resources in the Weekly Materials module in Blackboard <p>Activities</p> <ul style="list-style-type: none">• Discussion: <i>Funding Your Plan and ROI</i>• Live Success Session• CEO Chat Session
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Week	Preparation, Activities, and Evaluation
8	<p>PEOPLE MANAGEMENT</p> <p>Learning Outcomes</p> <ul style="list-style-type: none">• Evaluate key areas of strength and weakness in your organization's workforce• Identify team structures and key leadership roles that will be impacted by your strategic plan• Create a talent-management plan for the changes that need to be made <p>Weekly Materials and Readings</p> <ul style="list-style-type: none">• Duarte, Ch. 8: Building a Skimmable Slidedoc• Duarte, Ch. 9: Marveling at the Magnitude• Review materials from JWI 520• Additional Resources in the Weekly Materials module in Blackboard <p>Activities</p> <ul style="list-style-type: none">• Discussion: <i>Your People Plan</i>• Live Success Session• CEO Chat Session <p>Assignments</p> <ul style="list-style-type: none">• Assignment 3: <i>Plan Overview</i> (Due: Sunday, midnight of Week 8)



Week	Preparation, Activities, and Evaluation
9	<p>OPERATIONAL AND ORGANIZATIONAL CHANGE</p> <p>Learning Outcomes</p> <ul style="list-style-type: none">• Identify operational issues in your organization that impact your strategic initiative• Assess cultural issues that can impede the change process• Integrate the results of that analysis into your Board Presentation <p>Weekly Materials and Readings</p> <ul style="list-style-type: none">• Duarte, Ch. 10: Humanizing Data• Duarte, Ch. 11: Storytelling with Data• Review materials from JWI 550 and JWI 555• Additional Resources in the Weekly Materials module in Blackboard <p>Activities</p> <ul style="list-style-type: none">• Discussion: <i>Leading Change</i>• Live Success Session• CEO Chat Session <p>Assignments:</p> <ul style="list-style-type: none">• Complete the GRADUATE SURVEY – survey link and details can be found in the course menu in Blackboard (Due: Sunday, midnight of Week 10)

Week	Preparation, Activities, and Evaluation
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10	<p>WINNING</p> <p>Learning Outcomes</p> <ul style="list-style-type: none">• Synthesize your strategic, financial, and operational analyses of your chosen organization• Integrate all your work into a succinct, informative, executive-level presentation with supporting data• Present your vision of the future in a compelling manner to secure the support of your Board <p>Weekly Materials and Readings</p> <ul style="list-style-type: none">• Review materials from JWI 505• Additional Resources in the Weekly Materials module in Blackboard <p>Activities</p> <ul style="list-style-type: none">• Discussion: <i>Your JWMI Journey</i> <p>Assignments</p> <ul style="list-style-type: none">• Assignment 4: <i>Board Presentation</i> (Due: Sunday, midnight of Week 10)• Complete the GRADUATE SURVEY (Due: Sunday, midnight of Week 10)
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Grading Scale - Graduate

Graded Activities	% of Grade
Discussion Questions 10 Total: 1 Per Week	25%
Assignment 1: Framing the Problem/Opportunity Due: Sunday, midnight of Week 3	15%
Assignment 2: Data Analysis Due: Sunday, midnight of Week 5	20%
Assignment 3: Plan Overview Due: Sunday, midnight of Week 8	20%
Graduate Survey Due: Sunday, midnight of Week 10	2%
Assignment 4: Board Presentation Due: Sunday, midnight of Week 10	18%
Total	100%



CAPSTONE PROJECT

As the Chief Executive Officer, or equivalent senior-most leader, you are responsible for strategic planning and the alignment of people, processes, and resources needed to advance the organization's mission.

In your Capstone Project, you will apply what you have learned throughout the JWMI MBA program to a real-world situation. It is expected that you will use the terminology, tools, and models you have studied in previous courses related to analysis and strategic planning at the CEO and Boardroom level. Your task is to convince your Board that you have a credible plan that will not only improve the organization's performance over the next year, but also position it for significant long-term growth that will keep it ahead of the competition.

The Capstone Project has FOUR components. The first three parts will, together, form a Board Brief that you will send to your Board of Directors in advance of your presentation to provide them with background on your analysis and recommendation. This way, they can come to the Board Meeting better prepared to listen to your presentation. Each assignment in the Board Brief will build on the previous and will leverage the work you have done in the weekly Discussion Questions.

1. Framing the Problem/Opportunity (Due: Week 3)

In your first assignment, you will identify a problem or opportunity that can be addressed through a business analytics approach and provide sufficient background on the organization and the market to accurately frame the problem/opportunity for stakeholders. This will require you to gather data, evaluate the market your organization operates in, identify the competitors representing the greatest threats, and present the strengths and weaknesses of your organization.

2. Data Analysis (Due: Week 5)

Having accurately framed the core problem/opportunity in Assignment 1, you will now turn your attention to analyzing the data and presenting your findings. You are not yet ready to propose a specific action plan for your business. At this stage of your Board Brief, you will focus on assessing what data you have and don't have, as well as the patterns, trends, and anomalies they reveal.

3. Plan Overview (Due: Week 8)

The final component of your Board Brief is an overview of your strategic plan. You will be given feedback from your professor in advance of your final presentation which will include questions Board Members have. You will be expected to address these questions in your final presentation.

4. Video Presentation to the Board of Directors (Due: Week 10)

The final deliverable in your program at JWMI is the presentation of your plan. This is your opportunity to convince your Board that you have developed an achievable strategy to take the organization forward, and that *you* are the person who can execute the plan.



Guidance on Selecting a Focus Area and Organization for Your Capstone Project

IMPORTANT: The identification of a focus area and the selection of an organization and problem/opportunity are the topics of your **Week 1** and **Week 2 Discussion** posts.

- The Capstone Project requires that current, accurate, and verifiable data be used. This includes financial data and any other information required for your analyses, recommendation, and implementation of your plan. Thus, it is recommended you choose a publicly traded company or an organization for which financial statements are available and authorized for distribution.
- If you choose a privately held company, you must include verifiable financial data that is sufficiently detailed to support your analysis. Self-reported financial information is suspect, since those who provide the information often have something to gain by portraying their organizations in a certain way to the public.
- You are encouraged to choose an organization in your own sector for your Capstone Project. This could be a competitor, customer, or supplier. It could even be your own employer. This allows you to work with an organization and an issue that have a direct impact on your professional life and for which you may already possess some knowledge. **However, you will NOT be permitted to use the same organization you have previously used for a major assignment in JWI 540 or JWI 575.**
- Finally, the Capstone Project requires that you identify an opportunity that is significant enough to warrant the attention of the senior-most executive and their Board of Directors, and that will lead the organization to a position of sustainable market leadership.

Note: Every discussion question, starting in Week 1, is related to developing your analysis, arguments, and plan for your Capstone Project. It is to your advantage to post to the discussions early and to pay attention to the feedback you get from fellow students and from your course instructor. If you have any questions about your proposed organization and the sufficiency/validity of the data, please discuss this with your instructor as soon as possible. It is not the responsibility of the course instructor to help you locate or secure required data.

Evaluation of Capstone Project Submissions

Please review the grading rubrics carefully. You will see that the most heavily weighted components require you to come up with new insights, present a coherent argument for your proposed initiative, and provide authoritative support for your plan. As a leader, you must be highly skilled at focusing on the right information, avoiding excessive or irrelevant data, and articulating *why* the data are important and *how* they inform your choices and actions.



Assignment 1: Board Brief Part A – Framing the Problem/Opportunity

Due: Sunday, midnight of Week 3 (Weight: 15%)

Overview

Effective leaders understand that actions must be based on facts. Which facts are most important, however, depends on how the problem is framed. Failure to adequately define the problem can set in motion a series of misguided undertakings in which irrelevant data are gathered, unnecessary analyses are completed, and unsupported decisions are made. The first step in developing your Board Brief is to craft a clear statement of the problem/opportunity, and then determine which data are most critical to solving that problem. This is your opportunity to begin using the business analytics tools that will guide you throughout your Capstone Project.

Instructions

For all assignments in your Capstone Project, your work will be based on the organization you identified in your Week 2 Discussion Question post. In this assignment, you will submit a 2 to 3-page paper in which you will include a brief overview of market conditions and develop a clear and well-focused problem/opportunity statement. This requires you to provide sufficient background on the competitive environment and the organization to accurately frame the problem for your Board. Your deliverables are:

1. **Present a brief overview of market conditions, the competitive environment, and the strengths and weaknesses of your organization relative to your competitors.** You should draw on one of the methodologies you have studied in the program (such as Jack's 5 Step Strategy Framework, SWOT, PESTEL, or Porter's Five Forces) to guide you, but DO NOT present a full-blown market analysis to the Board. Your Board members will already possess significant knowledge of the market and the company, so use this overview to set the stage for the rest of your brief. Distill your overview down to 2 components.
 - a. First, provide a general overview of market conditions, trends, and big issues. For example, you may begin with a line such as *"As you know, we have experienced considerable challenges in this space over the last two years..."*
 - b. Then, summarize the competitive environment. Open with a sentence such as *"Our biggest competitor ABC has made bold steps to develop X and has made significant gains in market share in Y. This has presented us with a number of challenges..."*
2. **Problem/Opportunity Statement**

Following your overview, identify the specific problem or opportunity that, if properly addressed, will have a significant positive impact on the success of the organization. This will include your "testable hypothesis" for which you will gather and analyze data to validate in your next assignment. To accomplish this:

 - a. Define a clear problem or opportunity that addresses what is important to the organization in



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order to meaningfully improve its competitive strength. Note: It is expected that you will refine the problem/opportunity statement you drafted for your Week 2 Discussion Question, leveraging the feedback you received from your classmates and professor.

- b. Identify key data and metrics you will study that are relevant to addressing the problem/opportunity.
- c. Identify stakeholders who will be involved in addressing the problem/opportunity. At this stage, you do not need to name specific people, but you must identify functions, departments, geographical areas, etc., that will be impacted. You must also explain the nature of the potential impact.
- d. Include relevant information on previous experiences or findings related to this problem/opportunity. This information may be noted in an appendix if that is more appropriate for context and flow.

Formatting and Submission Requirements

NOTE: Use the **Board Brief Checklist** in the course shell to help guide your work. As you complete each of the three assignments, you will add it to the previous assignment(s), so that by the end of Assignment 3, you will have created a single document for your entire Board Brief.

- Submit your work in Word
- Include a cover page containing the title of the assignment, your name, your professor's name, and the course title and date
- Include a references page with your sources
- The cover page and the references page are not included in the required page length
- Use professional font (Times New Roman or Arial), 10-12 font size, and double-space
- Use headings to identify main topics and subtopics
- Separate paragraphs by a single space



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Rubric: Assignment 1

Criteria	Unsatisfactory	Low Pass	Pass	High Pass	Honors
1. Demonstrate correct application of selected framework for market analysis Weight: 15%	Did not use an approved framework or did not demonstrate understanding of the proper application of the selected framework	Demonstrated minimal understanding of the selected framework; included several incorrect applications of key elements	Demonstrated basic understanding of the selected framework; only minor incorrect or insufficient applications of key elements	Demonstrated very good understanding of the selected framework; no incorrect applications of key elements	Demonstrated deep understanding and thorough application of the selected framework; focused clearly on the most critical market forces
2. Include appropriate data and real-world examples to populate the selected framework for market analysis Weight: 15%	Did not include appropriate and verifiable real-world data and examples and/or included vague or unsubstantiated or irrelevant data and examples	Included 4 or fewer verifiable real-world examples and data; several data and examples were off-topic or poorly connected to key framework elements	Included 5 or more verifiable real-world examples and data; minimal examples were off-topic or poorly connected to key framework elements	Included 5 or more verifiable real-world examples and data; all examples were on-topic and connected to key framework elements	Included 5 or more verifiable real-world examples and data; all examples were extremely well-chosen and provided excellent support for key framework elements
3. Clearly define the problem and/or opportunity, leveraging feedback from DQs Weight: 20%	Did not submit or incompletely defined a problem or opportunity of importance to the organization; problem or opportunity not supported by market analysis	Problem or opportunity statement was overly vague and/or was not supported by market analysis; scope may have been too broad or too narrow	Problem or opportunity statement was supported by market analysis; scope may be too broad or too narrow and needed to be more tightly defined	Problem or opportunity statement was clear and was supported by market analysis; scope was appropriate and well-defined	Meets all HP requirements and includes a compelling call to action
4. Identify key data and metrics to study that are essential to addressing the problem and/or opportunity defined Weight: 25%	Did not identify key data and metrics relevant to the problem/opportunity or identified irrelevant data and metrics	Identified 2 or fewer key metrics and data relevant to the problem/opportunity; connection to the problem/opportunity may be unclear	Identified 3 or more key metrics and data relevant to the problem/opportunity; connection to the problem/opportunity is included, but is vague or overgeneralized	Identified 4 or more key metrics and data relevant to the problem/opportunity; connection to the problem/opportunity is clear and specific	Identified 5 or more key metrics and data relevant to the problem/opportunity; connection to the problem/opportunity is clear and specific and demonstrates excellent insight into potential causes and correlations
5. Identify stakeholders who will be involved in addressing the problem/opportunity Weight: 10%	Did not identify stakeholders and/or did not explain the rationale for inclusion and anticipated impact	Identified some stakeholders, but omitted additional key stakeholders; provided minimal rationale for inclusion and/or missing or unclear anticipated impact	Identified all key stakeholders and rationale for inclusion; provided basic explanation of anticipated impact	Identified all key stakeholders and rationale for inclusion and addressed the nature of anticipated impact	Identified all stakeholders, provided rationale for their inclusion, and made a clear connection between stakeholders and anticipated impact based on proposed actions
6. Describe previous findings or experiences related to the problem/opportunity Weight: 15%	Did not describe previous findings or experiences related to the problem/opportunity	Partially described previous findings or experiences related to the problem/opportunity; key findings were omitted or relevance was unclear	Satisfactorily described previous findings or experiences related to the problem/opportunity; key findings were included, but some explanations of relevance were vague	Thoroughly described previous findings and experiences related to the problem/opportunity; findings and experiences are reflected in all elements of the assignment	Exemplarily described previous findings or experiences related to the problem/opportunity; findings and experiences are evident in all elements of the assignment and are integrated in a meaningful way



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Assignment 2: Board Brief Part B – Data Analysis

Due: Sunday, midnight of Week 5 (Weight: 20%)

Overview

The second part of your Board Brief picks up where the last one left off. Having accurately framed the core problem/opportunity in Assignment 1, you will now turn your attention to collecting, organizing, and analyzing the data you are using to test your hypothesis. You are not yet ready to propose a specific action plan for your business. You will focus on evaluating what data you have and don't have, and on identifying patterns, trends, and anomalies. Because you can never have complete data, your analysis must acknowledge what you know and what you don't know. But, even with incomplete data, your actions must be *reasonable* given the time frame and resources you have. Those actions – your strategic plan – will be developed in Assignment 3.

Instructions

For this assignment, you will build on your first assignment by including an additional 3 to 4 pages to present your analysis of the data. Your submission must include the work you did in Assignment 1 and must provide relevant and quantifiable data, models, calculations, and analysis. Use the topics below to organize this section of your Board Brief:

1. Data Sources and Reliability

- a. What data were the most critical to the analysis of the problem/opportunity you identified in Assignment 1? Explain.
- b. What sources did you use to gather the data?
- c. How reliable and complete are the data you are using? What steps did you take to validate this?
- d. What data are unknown (or unknowable) at this stage? How does this impact your analysis?

2. Data Tools and Analysis

- a. Drawing from the "Types of Analysis" guide and other resources from the course, what tools and techniques have you used in your analysis? Why did you select these?
- b. Applying the analysis tools to your selected data, what patterns, trends, and anomalies did you uncover?
- c. How do these patterns, trends, and anomalies shed light on the problem/opportunity you identified?
- d. Leveraging your work in the Discussion Questions and the guidance from our course materials, include charts, tables, and/or other visual supports to ensure that your data tells a clear story that your reader can easily understand.

3. Conclusion and Action Items

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- a. What does your analysis tell you about where you should focus your efforts to drive meaningful improvement?

Formatting and Submission Requirements

NOTE: Use the **Board Brief Checklist** in the course shell to help guide your work. As you complete each of the three assignments, you will add it to the previous assignment(s), so that by the end of Assignment 3, you will have created a single document for your entire Board Brief

- Submit your work in Word
- Include a cover page containing the title of the assignment, your name, your professor's name, and the course title and date
- Include a references page with your sources
- The cover page and the references page are not included in the required page length
- Use professional font (Times New Roman or Arial), 10-12 font size, and double-space
- Headings are used to identify main topics and subtopics
- Paragraphs are separated by a single space



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Rubric: Assignment 2

Criteria	Unsatisfactory	Low Pass	Pass	High Pass	Honors
1. Data Sources and Reliability Weight: 25%	Response was missing, inaccurate, or off-topic, and/or addressed 2 or fewer of the questions	Provided a basic response to 2 or more of the questions; contained minimal detail or insight into the value of the data	Provided a good response to 3 or more of the questions; demonstrated good attention to detail and insight into the value of the data	Response provided a complete and well-reasoned treatment of all 4 questions and provided very good additional detail and insight into the value of the data	Met HP criteria plus added significant and relevant commentary on data identification and collection and application processes
2. Data Tools and Analysis Weight: 25%	Did not submit an adequate response for any of the data analysis questions	Submitted a complete and accurate response for 2 or fewer questions	Submitted a complete and accurate response for 3 questions, but lacked sufficient exploration of main themes	Submitted a complete and well-reasoned treatment of all 3 questions supported by specific examples	Met HP criteria plus added significant relevant insight from additional sources
3. Data Presentation Weight: 30%	Data presentation was missing or poorly displayed; did not make use of appropriate charts, tables, graphs, or other tools covered in the course	Data presentation used 2 or fewer tools covered in the course and/or selection of tools was arbitrary and did not direct the reader to critical patterns, trends, and anomalies	Data presentation used 3 or more tools covered in the course, but selection of tools seemed arbitrary; critical patterns, trends, and anomalies were not clearly displayed	Data presentation used 3 or more tools covered in the course; selection of tools was appropriate for each data set and enabled the reader to clearly identify critical patterns, trends, and anomalies	Met all HP criteria plus made excellent use of color, page layout, and other design elements that made the paper engaging and visually compelling
4. Conclusions and Action Items Weight: 20%	Conclusions and action items were missing, unclear, or did not connect the data and analysis	Conclusions and action items were basic and lacked sufficient detail or did not connect the data and analysis	Conclusions and action items were sound and supported by the data and analysis	Conclusions and action items demonstrated excellent insight and were well-grounded in the data and analysis, demonstrating a solid grasp of real-world obstacles and opportunities	Met all HP criteria plus included additional insights and references, demonstrating a thorough understanding of Jack's guidance on 'eating and dreaming'



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Assignment 3: Board Brief Part C – Overview of the Strategic Plan

Due: Sunday, midnight of Week 8 (20% of Course Grade)

Overview

The third component of your Board Brief is an overview of your strategic plan. The purpose of the overview is to give Board members a preview of the key changes you will make in order to implement your plan, and to explain how these changes will impact the organization. This information enables your Board to come to the meeting better prepared and to ask more informed questions. Your overview must be clear and complete enough that it makes sense, but it should not be overly wordy.

Your instructor will review your strategic plan and will provide comments and questions where needed to help you strengthen your presentation. You will be given these questions in advance of your presentation and will be expected to address them in your delivery.

Instructions

1. Building on your previous submissions, include an additional 3 to 4 pages to take the analysis work you have done in the first two assignments and turn it into an actionable plan.
2. An effective plan overview will include:
 - a. A clear and compelling opening statement (executive summary) explaining the strategic initiative
 - b. A high-level outline of your implementation plan, including costs, impact on operations, ROI projections, competitive advantage, and risks associated with the plan, along with your mitigation plans
 - c. A reminder of the challenges and opportunities facing the organization and how your proposed plan will address these
 - d. Enough information allowing Board members to prepare for the upcoming meeting and to formulate additional questions
 - e. A summary statement recapping why the proposed strategic initiative is necessary and the approvals being sought at the upcoming Board meeting



Formatting and Submission Requirements

NOTE: Use the **Board Brief Checklist** in the course shell to help guide your work. As you complete each of the three assignments, you will add it to the previous assignment(s), so that by the end of Assignment 3, you will have created a single document for your entire Board Brief

- Submit your work in Word
- Include a cover page containing the title of the assignment, your name, your professor's name, and the course title and date
- Include a references page with your sources
- The cover page and the references page are not included in the required page length
- Use professional font (Times New Roman or Arial), 10-12 font size, and double-space
- Headings are used to identify main topics and subtopics
- Paragraphs are separated by a single space



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RUBRIC: Assignment 3

CRITERIA	Unsatisfactory	Low Pass	Pass	High Pass	Honors
1. Executive Summary/ Opening Statement Weight: 10%	Executive summary was missing or off-topic	Executive summary covered main points, but was disorganized or overly detailed	Executive summary provided a basic synopsis of the strategic plan	Executive summary provided an excellent synopsis of the strategic plan	Met HP criteria plus displayed an engaging style that indicates a powerful opening that will grab the audience
2. Plan Outline Weight: 30%	Missing, incomplete, or unrealistic explanation of the strategic plan	Strategic plan was outlined, but lacked substantive rationale for key choices and actions	Strategic plan was outlined; included basic rationale and information on key choices and actions	Strategic plan included a clear and well-reasoned rationale; included key information on strategic choices and actions	Strategic plan is justified by keen insight into market dynamics and competitors' strengths, and provided a viable solution for both near-term and long-term growth
3. Financials Weight: 20%	Performed no financial calculations or made substantive errors	Financial models and calculations included minor errors or assumptions which did not materially impact the strategic plan	Correctly performed all basic financial calculation and modeling	Met Pass criteria plus included detailed calculations that correctly and accurately summarized the financial health of the organization	Met HP criteria plus included comprehensive forward-looking calculations of payback relative to IRR and other key performance metrics
4. Competitive Advantage Weight: 15%	Did not identify impact on competitive strength or presented assertions not supported by data	Identified potential impact of the strategic plan move on competitive advantage, but did not address sustainability of advantage	Identified potential impact on competitive advantage and provided basic insights into the ability of competitors to match move(s)	Clearly explained the sustainability of the move(s) and why competitors will not easily be able to match	Met HP criteria plus offered additional valuable insights into evidence supporting the sustainability and superiority of the strategic plan
5. Risk Weight: 15%	Incomplete or unclear synopsis of any of the most important strategic risks	Risk analysis was superficial, demonstrating only a basic understanding of the threats to the proposed strategic plan	Risk analysis demonstrated basic understanding of risks and the upside opportunity relative to that risk	Clearly explained potential for risk, risk impact on the organization, and plan for risk mitigation	Met HP criteria plus explained why proposed plan is superior to other risk-reward options
6. Summary Weight: 10%	Missing, incomplete, or unclear summary	Summary was vague and/or failed to connect key elements of the plan	Summary provided a basic recap of connection of key elements of the plan	Summary recapped key elements and drew the Board Brief to a clear and concise close	Met HP criteria plus presented an inspiring and compelling call to action that this is <u>the plan</u> that will take the organization forward



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Assignment 4: Board Presentation

Due: Sunday, midnight of Week 10 (18% of Your Course Grade)

Overview

You've been working hard, and you've have gained a lot of insight into your organization. You have:

- ✓ Formed a hypothesis about an area of opportunity to drive meaningful growth (Assignment 1)
- ✓ Collected and analyzed relevant data to validate your hypothesis (Assignment 2)
- ✓ Delivered a clear outline of your strategic plan to your Board (Assignment 3)

In completing this work, you've taken a close look at the internal and external environments, you've examined the financials and determined what is needed to accomplish your plan and what the payback should look like, and you've looked at the current people and structures in light of what it will take to execute your plan. Now, there's just one item left to address – convince the Board to give you the go-ahead. This week, you'll make your pitch! Remember, you will be making an “ask” in your presentation, so always answer questions in your presentation *before* your audience has an opportunity to raise them.

Instructions

Your presentation must be well-organized, compelling, and delivered with the executive presence expected of a leader. You should make use of PowerPoint or other visual tools as part of your presentation to support your delivery. There is no required sequence or organization for your content. *You must decide how you wish to begin, advance, and conclude the presentation. However, you must ensure that you address the “Board Questions” you received from your professor in your Board Brief feedback.*

If there are data that are important in presenting your plan, you must reference these in your presentation, but do NOT waste your opportunity in front of the Board by delivering a “data dump.” Judiciously referencing key data to support your position is a demonstration of your depth of knowledge and your capability as a leader, but analytics alone will not win the day. Your presentation will require you to:

- Present persuasively, logically, and clearly
- Address the following required content areas:
 1. Questions received in your feedback from your Board Brief
 2. Plan outline and benefits
 3. Data collected and analysis overview
 4. Competitive and market advantage to be gained from your plan
 5. Financials – addressing both costs and benefits
 6. Risk and mitigation plan
 7. Conclusion/recommendations
- Demonstrate your executive presence using supporting infographics and delivery to convey



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confidence, conviction, energy, and passion

- Dress and speak appropriately, and exhibit effective body language and mannerisms, tone, and mastery of the content...just as a great leader would
- Assume the role of a “salesperson” asking for funding and permission to proceed by leveraging data and storytelling to articulate the value, costs, and benefits to the Board

Formatting and Submission Requirements

1. Use the Zoom video tool
2. Your maximum length is 5 minutes
3. IMPORTANT: Submit only the .mp4 format version of your saved file
4. Your presentation must include PowerPoint or other visual support tools
5. Your slide deck is not to exceed 15 slides



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Rubric: Assignment 4

CRITERIA	Unsatisfactory	Low Pass	Pass	High Pass	Honors
1. Stays in time and within the slide limit Weight: 10%	Exceeded time limit by more than 3 minutes and/or included 21 slides or more	Exceeded time limit by 2 to 3 minutes and/or included 19 to 20 slides	Exceeded time limit by 1 to 2 minutes and/or included 17 to 19 slides	Exceeded time limit by 1 minute or less and kept within 15 slides	Stayed within 5-minute presentation time and 15 slide limit
2. Addresses all area as described in assignment instructions Weight: 50%	Addressed 3 or fewer of the required content areas	Addressed 4 of the required content areas	Addressed 5 of the required content areas	Addressed 6 of the required content areas	Addressed all 7 of the required content areas
3. Makes good use of visuals to support clear transitions and highlight key points in the presentation Weight: 20%	Ineffective or irrelevant use of visual materials to support presentation	Minimal use of visual materials to support presentation or overuse of data-heavy slides and charts that were not clear or which made reasoning and flow difficult to follow	Good use of visual materials to support presentation; no use of data-heavy slides or charts that were unclear; contained occasional examples where visuals did not support a clear storyline and/or transition points in the presentation	Very good use of visual materials to support presentation; no use of data-heavy slides or charts that were unclear; supported a clear storyline and smooth transitions from one point to another	Excellent use of visuals ensured that all parts of the story were clear and contributed to a presentation that was engaging and easy to understand, allowing the reader to focus on what is being presented
4. Persuasive delivery of strategic plan, demonstrating strong executive presence Weight: 20%	Strategic plan was not persuasive; delivery lacked confidence, demonstrated poor eye contact, vocal control, pacing, and/or appropriate focus on key points	Portions of the strategic plan were persuasive, but overall delivery was unconvincing, demonstrating lack of confidence, poor eye contact, vocal control, pacing, and/or appropriate focus on key points	The strategic plan was persuasive; delivery was solid, but unremarkable; no critical shortcomings in vocal control or eye contact; appropriate focus on key points	The strategic plan was very persuasive and well-supported; delivery was strong with good use of eye contact and vocal control; excellent use of timing and intonation to draw attention to key points	The strategic plan was exceptionally well-presented and contained strong evidence that convinced the Board the presenter is the CEO with the right plan and the leadership skills needed to get it done