



BA 501 - Applied Strategy

Course Syllabus
Winter Quarter 2020

Instructor

Russell Walker, Ph.D.
Paccar 496

rwalker1@uw.edu

Office Hours: By appointment. Please email me to set up a time.

Presentation Support

Gregory Heller, Business Communications Advisor
Dempsey 224 gheller@uw.edu 206-543-2351

Course Information

Course Materials: There are no required textbooks or Course Packs for Applied Strategy. Course materials will be available on Canvas.

Course Theme: Apply what you've learned and grow through practical experience. Under promise and over deliver to exceed expectations of all stakeholders including those of the instructor and project sponsor.

Course Objectives: This course offers a practical "learning by doing" experience in which students apply concepts, tools, and theories from the MBA curriculum to the complex, unstructured, real-world challenges and opportunities faced by managers. Management draws evidence-based insights from a variety of disciplines. (e.g., accounting, finance, marketing, strategy, etc.) Insights gleaned from your practical application of toolsets and knowledge to business scenarios can generate significant value for stakeholders.

Course Overview: This course is unlike any other in the Foster MBA program in that most of the class sessions should be used to meet with project sponsors, conduct research, or interact with the course instructor. Required sessions are listed on the MBA Core schedule and on the last page of the syllabus.

- All students are **required to attend the kick-off** with the project sponsors on Tuesday, January 14 from 12:15-4:45 p.m. Introductions and lunch will be served in the Intellectual House followed by breakout working sessions with your team and project sponsor in assigned PACCAR team rooms.
- There will be **two required check-in meetings** with the instructor and program staff. At the first meeting the team will review and discuss the initial project scope with the instructor and/or program staff. The purpose of the second meeting is to have a mid-point check-in, where teams will create a deck to share their progress and make sure they are on track with their projects.
- Each team is **required to complete a practice presentation** at least one week prior to the team final presentation. Final presentations will take place at the sponsoring company offices (unless prior arrangements have been made). Please refer to the schedule for further details. Gregory Heller will work with teams and individuals to clearly and powerfully communicate final recommendations to clients. Gregory will work with you to help you hone your content development and presentation skills to most effectively communicate messages to the project sponsors.
- In addition to the limited in-class commitments, each student is expected to invest **10-15 hours** on average per week interfacing with the project sponsor, working within the team, communicating with the instructor or program staff, or otherwise working on the project.

Method of Instruction: Applied Strategy is purposefully designed to differ from other core curriculum in the Foster MBA Program experience in order to support the unique goals of this course. If you approach this course the way that you have successfully approached others in the Foster MBA Program, you will

almost surely be disappointed. Responsibility for structuring work on the project and the learning experience shifts substantially to the individual and student teams.

- To succeed, you will have to demonstrate both a tolerance for ambiguity in the face of often unstructured challenges, and an inventiveness in assembling resources that is not common to other courses. The essence of the course lies in using your skills, knowledge, and experience to think critically and creatively to achieve organizational objectives as articulated by your sponsoring organization. You should feel free to approach the instructor, the MBA Consulting program staff, and others in your network to help drive the project to a successful conclusion. If you are confused or uncertain, we strongly urge you to ask for help as soon as possible rather than waiting until the last minute. The advice will enable you to both be more successful on the project and potentially learn more that is applicable to your ongoing academic and professional development.
- You and your team are expected to work professionally, insightfully, and creatively in completing the project, conducting yourselves with the integrity and respect consistent with the outstanding culture of the Foster MBA Program.

Course Credit: Your performance in the course will ultimately be evaluated by the instructor on a “Credit/No Credit” basis. Your performance will be judged not only on how well the ultimate project deliverables aligns with the sponsoring company goals but also on your investment in the course assignments.

- Consideration will be given to the perspectives offered by your sponsor, but the instructor will retain sole responsibility for making the final call on grades.
- It is the expectation of the instructor that each participant in the course will demonstrate sufficient competency and mastery of content to earn a “Credit” assessment. However, the instructor will exercise the “No Credit” option if you choose to pursue consistently a path that does not create sufficient value for yourself, your team, or your sponsoring organization.
- Your work within the class will be evaluated on several dimensions. Details about each assignment, including instructor expectations regarding content, format, length, etc., will be provided. The relative weighting of each of the evaluation dimensions and the submission mode—team or individual—are given below. If submission requirements are unclear after viewing the assignment, please contact the instructor for clarification.

To receive credit for the course:

- Attend all scheduled classes and the January 14 kickoff lunch and working session.
- Attend the required team meetings (scope review meeting and mid-point review meeting).
- Participate in the practice presentation.
- Participate in the final presentation.
- Complete the individual video interview assignment.
- Complete all team assignments on-time and in accordance with instructions.

Required Assignments:

	Assignment	Team or Individual	Due Date	Weight
1.	Team Bio & Email	Team	1/10	5%
2.	Preliminary Scoping Doc	Team	1/13	5%
3.	Memo of Understand	Team	1/20	10%
4.	Research Plan & Timeline	Team	1/27	10%
5.	Mid-Point Deck	Team	2/3	10%
6.	Draft Presentation*	Team	2/28-3/6**	20%
7.	Final Deliverables**	Team	3/12	35%
8.	Video Interview	Individual	3/12 or after	5%

**Draft presentation is due 24-hours prior to your team practice presentation.*

***Final deliverable format will vary by team. Please discuss with instructor if you have questions.*

- Prior experience suggests that the final presentation is a critical determinant used by the project sponsors in assessing how well teams met project goals; however, the interim deliverables (assignments) serve two useful purposes. First, interim deliverables serve to facilitate conversations with the instructor and other stakeholders that will allow you to focus your effort. They give those who have a strong interest in your success a better understanding of your project, and they allow the opportunity to provide critical, constructive feedback. Second, deadlines imposed by interim deliverables “force the action” in your project. These targets keep project momentum flowing.
- Guidelines for assignments (deliverables) are provided in a way that should impose minimal additional burdens upon your team beyond the completion of the project itself. Guidelines for each deliverable are available on Canvas. Please feel free to contact the instructor if you would like further guidance.

Honor Code & Professional Conduct: The course involves substantial interaction with stakeholders outside the Foster School of Business, and the expectation is that you conduct yourself in the highest professional manner. Previous students have suggested that you will succeed on this dimension to the extent that you treat the project less like a traditional course and more like a job. That is, show up on time and prepared, keep your sponsor and other stakeholders informed, and deliver as promised.

- If you conduct any research with third parties in conjunction with the project, you should represent yourselves as a Foster MBA student team working on a class project on behalf of an organizational client. While it is an accepted practice in the market research industry to not disclose the specific identity of your client if doing so would introduce bias into the data you

collect, you should be prepared to disclose the fact that you have a client sponsor and the general industry the sponsor operates in. *Please note that this may not be sufficient for all research respondents, and some may choose not to participate in providing research data.*

- The expectation is to employ the principles and procedures espoused by Foster School of Business MBA Honor Code to maintain academic integrity in the course and project deliverables. While all aspects of the Honor Code apply to the course, the fundamental issue faced in Applied Strategy typically involves proper attribution of source material for the deliverables.

Non-Disclosure Agreements: Because of the special nature of this course, you may be provided access to certain non-public or otherwise confidential information. **You are expected to keep all such information confidential in accord with the goals of your project sponsor.** This extends to all interactions with those outside your team, e.g., do not discuss your project specifics with students on other teams.

- Our teams often work with projects or services whose sponsors who are cautious by nature. As a result, you may be asked to sign a Non-Disclosure Agreement (NDA) before the sponsor will share important information with you.

Applied Strategy Course Schedule

Students are expected to reserve the class time allotted for Applied Strategy class to work on their projects as a team. The instructor reserves the right to meet with teams or individual students during the allotted class time. Each team will sign up for check-in meetings with the instructor, practice presentations, and final presentation time slots.

Date	Topic	Details
December	Research	<i>Begin learning about the company you are working with as well as the industry/project topic. Set-up a news alert to keep you apprised of any major happenings with the company/industry.</i>
1/10	Assignment #1 Team introduction email & bios	Prepare: Create team bios (use template or create your own) Communicate: Send an introductory email, including your one-page of team bios on or before Friday, January 10.
1/13	Assignment #2 Preliminary Scoping Doc	Draft: Document the preliminary project scope, using the project descriptions provided, to agree with your sponsor at the kickoff
1/14 12:15-4:45 p.m.	Class Session #1: Kick-off with Sponsors	Applied Strategy Kickoff Luncheon (required attendance): <ul style="list-style-type: none"> • <i>Part 1 - Intellectual House: Introductions and lunch</i> • <i>Part 2 - Paccar Team rooms: Working session with sponsors</i>

		<ul style="list-style-type: none"> • <i>Part 3 – Intellectual House: Best Practices in Project Execution</i> <p>Discuss: Review the preliminary project scope and agree with your sponsor</p> <p>Plan: Define next steps/actions required to move the project forward</p>
1/16	Class Session #2: Project Management Overview	1:30-3:00 Sec 1 or 3:15-4:45 Sec 2
1/20, 11:59 p.m.	Assignment #3: Memorandum of Understanding	All teams. Draft a memorandum of understanding to agree the final project scope with the sponsor.
1/27-1/31	Scope Meetings with Instructor & Team	Each team will sign-up for a 30-minute time slot
1/27, 12:00 p.m.	Assignment #4: Research Plan & Timeline Submit on Canvas	All teams. Assignment details on canvas.
1/28	Class Session #3: Presentation Best Practices with Gregory	1:30-3:00 sec 1 or 3:15-4:45 sec 2
2/3, 12:00 p.m.	Assignment #5: Mid-Point Slide Deck Submit on Canvas	All teams. Assignment details on canvas.
2/3-2/7	Mid-Project Review Meetings	Each team will sign-up for a 30-minute time slot
2/10-2/17	Mid-Project Update to Company	Required check-in meeting with company. Present your research findings and confirm direction for final weeks of the project.
2/24-3/6 24-hours before your practice presentation	Assignment #6: Draft Presentation Submit on Canvas	Submit the draft version of your PowerPoint slides at least 24-hours before your practice session. If you do not submit your draft presentation 24-hours before, we may ask that you reschedule your practice presentation.
2/24-3/6	Practice Presentations	Each team will sign-up for a 45-minute time slot (via Google Docs). Practice session must take place at least one week prior to final presentation. <i>All students must attend and participate in the practice presentation</i>
3/12-3/13*	Final Presentations	Schedule your final presentation at a time that works for your project sponsor.

		<i>Attendance of ALL TEAM MEMBERS at the final presentation is required</i>
3/12, 11:59 p.m.	Assignment #7: Final Presentation Submit on Canvas	All teams. Submit your final PPT presentation AND any additional materials you provided to your project sponsor including white papers, reports, financial analysis, surveys, etc.
3/12, 11:59 p.m.	Assignment #8: Video Interview Submit on Canvas	Individual Deliverable. Review the assignment on Canvas for additional details.

* You are responsible for scheduling a time that works for the **company and all team members**.