I. Purpose and Objectives

As the Capstone for the Bridge MBA program, the goal of this course is to help you see how you can now apply the business skills you have acquired to address strategic organizational challenges. To do this you will need to analyze the economic, market and competitive forces that shape business strategy and performance for a client. You will also be required to assess the change readiness for implementing whatever strategic recommendations follow from your analyses.

The context for your strategy and change work will be a real organization with an important strategic challenge or opportunity. Student teams will be formed to meet with and advise clients who will be interested in your insights. Students will be expected to use their knowledge and judgment in the spirit of stewardship to make suggestions that will help their clients address real operational problems and concerns. The clients of successful teams will find value in their interactions and the project work products.

During the quarter students will need to draw upon a variety of skills to accomplish their work, including: negotiations, communications, problem analysis, financial analysis, brainstorming, decision making, library research, meeting management, report writing, executive briefings and presentations, and more. The objectives of the course are to:

- Learn how to assess the competitive environment of an organization and evaluate its current strategy in terms of potential opportunities
- Gain experience developing a strategy for an organization with new interests
- Work with a client to understand and help shape an organizational strategy
- Obtain practical experience in managing changes required to implement elements of a new organizational strategy
II. Class Organization and Activities

This course involves both academic and practical work. There will be weekly lectures and discussions on strategy formation and change management. Strategy project teams will also be formed to provide an opportunity to apply this and other Bridge knowledge to address the interests of a real organization.

This class contains three components. In one part of the course we will study Michael Porter’s classic strategy work and seek to apply it through discussions of a number of contemporaneous cases. The emphasis here will be placed on providing students with an understanding of principles of strategy development that are applicable to many organizational situations. Students will have the opportunity to interact with experienced business executives and collaborate with them in team strategy formation work.

Most organizations have had disappointing change experiences and so we will use William Bridges classic change management work to assess change readiness. As it turns out, one of the most challenging things about managing change is not figuring out what to start but instead what to end. This will be a central focus for assessing the readiness of your organization for implementing the strategic change you help design.

The third component is a professional report and presentation to clients of the work performed. Successful teams will produce results their clients will want to share with other key stakeholders and should also be referenceable in subsequent job searches.

Material covered in class during the quarter will be directly and systematically linked to the projects that are being executed. The explanation and rationale for the techniques and skills required to successfully develop strategies and strategic change projects will be developed sequentially. The lectures in the course focus on topics relevant to the life cycle stage of any strategic advisory engagement.

There will be no class sessions on Thursdays. Instead, this time will be reserved for teams to work on their projects, though how they schedule this will be up to them. Teams are expected to leverage university resources with the objective of producing high quality work products, and the professor is available to meet with teams if they so desire.

Client executives will be invited to the 2nd class session, their schedules permitting, to describe their products/services and industry, and to share informally their plans, objectives, activities and experiences, as well as the issues which affect the choices and decisions that have inspired their projects. The course is intended to be a great opportunity to interact with senior executives from a variety of local organizations and ideal for those building networks as they near graduation!

III. Required Texts

IV. Grading

Student performance will be evaluated in three principal ways. First will be the contributions students make to weekly class discussions based on reading assignments and how the material is, or is not, germane to the team project work. This will require the student to both come to class prepared and actively participate in discussions.

Second will be tests. These will take three forms:

1. Each team will make a case presentation to the class that applies strategy and/or change material to understand an emerging strategic issue/phenomenon
2. Each student will write a 500+ word memo for their client addressing how the work of Porter and Bridges is relevant to their project
3. A mid-term exam to test student ability to recall and correctly apply strategy and change terms/concepts Porter and Bridges use.

The third way student performance will be evaluated is in the quality of their report and presentation. The report and presentation are expected to be of high quality and professional. Teams should also view this as an integrative assignment and draw upon all the courses in the Bridge program – e.g., recommendations should have an estimated ROI. Since you may desire a recommendation yourself from your client, it is suggested teams use the SU Writing Center if that will help them achieve a quality work product.

Finally, students will get (and give) a peer assessment from their project teams. The purpose of this is to discourage “free rider” behavior and incent each team member to make the most of her/his capabilities and talents to the benefit of your client.

Grades will be based on the following sources of points:

<table>
<thead>
<tr>
<th>Component</th>
<th>Points</th>
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<tbody>
<tr>
<td>Class Participation</td>
<td>10</td>
</tr>
<tr>
<td>Client Memo</td>
<td>10</td>
</tr>
<tr>
<td>Case Discussion</td>
<td>5</td>
</tr>
<tr>
<td>Midterm</td>
<td>25</td>
</tr>
<tr>
<td>Client Report</td>
<td>50</td>
</tr>
<tr>
<td>Client Presentation</td>
<td></td>
</tr>
<tr>
<td>Reflections &amp; Peer Evaluation</td>
<td>+/-</td>
</tr>
</tbody>
</table>

An “A” will require 94 points, a “B” at least 82 points.
## VI. Class Schedule

<table>
<thead>
<tr>
<th>Date</th>
<th>Topics &amp; Activities</th>
<th>Magretta Chapters</th>
<th>Bridges Chapters</th>
<th>Case/ Discussion</th>
</tr>
</thead>
</table>
| 6/26   | 1. Course Introduction  
       |   • Select Group Projects  
       |   • Strategy & Change Intros  
       |   • Advisory Best Practices  | None            | None                          | None                          |
| 7/3    | 1. Project Status Reports  
       |   2. Strategy & Competition  
       |   • What is Competition?  
       |   3. Strategy & Change  
       |   • Change Process  
       |   4. Project Kick-Off Meetings  | 1                | 1 & 2                        | None                          |
| 7/10   | Due: Memo on Relevance of Porter & Bridges                                          |                   | Bridgewater & Culture  
       |   (Role of Binding Principles)  | 2                | 3                            |                                |
| 7/17   | 1. Project Status Reports  
       |   2. Strategy & Competition  
       |   • The Five Forces  
       |   3. Strategy & Change  
       |   • Endings Checklist  
       |   4. Guest: Eric Moen, former CEO, Pacific Coast Feather on Business Models  | 3                | 4                            | New Seasons & Gentrification  
       |   (What is Value and to Whom?)  |                   |                               | (What is Value and to Whom?)  |
| 7/24   | Midterm Exam                                                                        |                   | Exam: 1 to 3  
       |   Exam: 1 to 4  
       |   None                        | 4, 5              | 5                            | None                          |
| 7/31   | 1. Project Status Reports  
       |   2. Strategy & Competition  
       |   • Creating Value & Trade-offs  
       |   3. Strategy & Change  
       |   • New Beginnings Checklist  | 6, 7              | None                        | Starbucks  
       |   Fit and Continuity  
       |   Problem, approach and strategic findings  |                   |                               | (Experience Markets)  |
| 8/7    | 1. Strategy & Change  
       |   • Intrapreneurial Change  
       |   2. Team Rehearsals:  
       |   • Findings & ROI of recommendations  
       |   3. Course Reflections  | None             | None                        | What I Learned about Strategy and Change  |
VII. Course Policies:

- **No late submissions, no make-ups, and no late work will be accepted.**

- The ability function as a strategy adviser requires an ability to control expectations and respond to emergent situations. The instructor is available during or after class, or by phone to discuss questions or issues emerging for students in the class. Please call at least 24 hours prior to any requested discussion to reserve time.

- Students are expected to participate actively in class discussions much like they would on a consulting team. Your insights and interpretations are a critical part of your work as a consultant. As for class attendance, you are expected to attend all the sessions and come to class before it starts. Most classes will start with a discussion of emergent issues or concerns.

- **There is no reason students should need to use computers during the class.** It is important for consultants to be “in the moment” with their clients and colleagues! Likewise, **Cell Phones and PDAs must be turned off before entering the classroom.**

- **Academic Honesty Policy:** This course includes a team project and encourages cooperative learning. Still, students using work authored or created by others anywhere (including the Web), are expected to provide appropriate reference and credit. Failure to do so will be treated as academic dishonesty resulting in dismissal from the course.

- If you have, or think you may have, a disability (including an ‘invisible disability’ such as a learning disability, a chronic health problem, or a mental health condition) that interferes with your performance as a student in this class, you are encouraged to arrange support services and/or accommodations through Disabilities Services staff in the Learning Center, Loyola 100, (206) 296-5740. Disability-based adjustments to course expectations can be arranged only through this process.

- **Title IX of the Education Amendments of 1972 (Title IX) prohibits discrimination based on sex in educational programs or activities that receive Federal financial assistance.** This prohibition includes sexual misconduct, which encompasses sexual harassment and sexual violence. Seattle U remains committed to providing a safe and equitable learning, living, and working environment. Seattle U offers emergency, medical, and other support resources, as well as assistance with safety and support measures, to community members who have experienced or been impacted by sexual misconduct.

Seattle U requires all faculty and staff to notify the University’s Title IX Coordinator if they become aware of any incident of sexual misconduct experienced by a student.

For more information, please visit [https://www.seattleu.edu/equity/](https://www.seattleu.edu/equity/). If you have any questions or concerns, you may also directly contact the Title IX Coordinator in the Office of Institutional Equity (email: oie@seattleu.edu; phone: 206.296.2824)