ELI 9001A – BUSINESS AND MANAGEMENT: A GLOBAL PERSPECTIVE

COURSE OUTLINE, FALL 2021

DESCRIPTION

Speak the language of Top Management. Discover how Sustainable Businesses deliver results. Learn the essentials of Financial Statements. Create Marketing plans. Discover how different industries and businesses operate. Create and deliver new entrepreneurial ventures, on your own or for your employer. Share your own examples! Learn to be effective and make a contribution! Be innovative and make a difference!

In twelve weekly modules including lectures and class discussion, we will explore:

- Business Sustainability: Economic value, social benefit, and environmental accountability
- Financial Statements: The four essential statements, accounting terms, financial & economic analysis
- Project Finance: Planning, budgeting and forecasting; and securing financing for your project or venture
- Marketing: Marketing planning and management, service and technology evolution, digital marketing
- Industry sectors and how they operate: banking, insurance, agriculture, manufacturing, non-profits etc.
- Operations: Organizational structure, processes, policies, change management, process improvement
- Entrepreneurship: Defining a business model, creating a detailed business case and cash flow forecast

Graded work consists of individual and team written reports, and individual in-class Contribution. The key to success in this course: Imagine you are in a Top Management role; what would you do, and why?

ENROLLMENT RESTRICTIONS

Enrollment in this course is restricted to graduate students in the M. Eng. program, and students in the Engineering Leadership and Innovation Graduate Diploma program.

INSTRUCTOR CONTACT INFORMATION

Course instructor & email address: David Sumpton, MBA, M.Eng., P.Eng.  dsumpton@uwo.ca
Office & office hours: Videoconference. Schedule to be confirmed on 1st day of class and published in OWL.

COURSE FORMAT

- Face-face meetings: Thursdays, September 16 – December 2, 2021, 09:00 – 12:00, Arts & Humanities 2B02.
  - If University or Public Health guidelines require us to move the class online, remaining meetings will be held by Zoom videoconference at the same scheduled times.
- OWL: Required readings, instructional materials, assessments, course announcements. Please logon to your University email address to receive essential messages.
TOPICS

Learning activities include lectures, readings and class discussion. Written assessments (70% of grade) are listed by module. Individual contribution grades are assessed for Modules 2-5 (10%) and for Modules 6-12 (20%).

<table>
<thead>
<tr>
<th>Module</th>
<th>Module learning objectives</th>
<th>Module topics</th>
<th>Assessments</th>
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</table>
| Global Business #1: Sustainable business practices | • Discover how a business can be successful and sustainable  
• Apply ethics in business practices and decision-making  
• Integrate perspectives and abilities of other people to deliver better results  
• Explore the role of the Engineer as a “business partner” | • Business in Canada & global economy  
• Economic value, social benefit, and environmental accountability  
• Business strategy and success factors  
• Physical asset management  
• Management behaviour: international cultures, personal & cognitive diversity, inclusion, Indigenous topics | |
| One | | | |
| Sep 16 | | | |
| Two | • Create a viable Team Charter  
• Formulate a credible and feasible business idea, with the Modified Business Model Canvas  
• Produce and pitch the idea with a summary presentation | • Entrepreneur and Intrapreneur  
• Developing ideas: product, process, and business model  
• Design Thinking explained  
• Modified Business Model Canvas  
• Business Case for Sustainability | Business Proposal  
Team Report  
10% grade  
Must ask instructor to approve idea |
| Sep 23 | | | |
| Finance and Accounting: Financial statements, forecasting cash flows, project financing | • Understand and analyze financial statements, and the environment in which they are prepared | • Definitions: revenue, expense, capital  
• Four essential financial statements  
• Financial statement analysis | Finance:  
Individual Report  
25% grade  
Individual written report  
Instructor provides the companies or situation for you to analyse |
| Three | | | |
| Sep 30 | | | |
| Four | • Forecast cash flows and financial statements  
• Evaluate & justify project and operational investment decisions | • Economic analysis (time value of money) and its limitations  
• Sensitivity analysis in cash flows  
• Activity-based costing  
• Project and program selection tools | |
| Oct 7 | | | |
| Five | • Determine how companies are valued  
• Finance projects & operating activities, from internal company budgets, or external financing sources | • Business valuation  
• Legal entity structure  
• Company budgeting & planning  
• Global Finance system  
• Debt & equity sources, the financier’s perspective, Islamic finance | |
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<tbody>
<tr>
<td><strong>Marketing: planning and management, product and technology evolution</strong></td>
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| Six    | • Determine existing and new market opportunities  
• Consider business strategy & objectives, and technology evolution | • Market segmentation & niches  
• Product lifecycle  
• Technology and physical asset lifecycle  
• Product and Technology innovation: ‘blue ocean’, hype vs reality  
• Digital marketing and IT applications  
20% grade  
Individual written report  
Instructor provides the companies or situation for you to analyse |
| Oct 21 | | | |
| Seven  | • Develop and apply targeted marketing plans  
• Improve company brand & financial position | • Marketing activities & influencing others  
• Price, profits & Finance integration  
• Brand, quality, customer experience | |
| Oct 28 | | | |
| **Global Business #2: Exploring different industries** | | | |
| Eight  | • Apply analytical tools to assess the success factors of a Business or an Industry  
• Discover how different industries operate | • Analysis tools: SWOT, PESTLE, 5 forces  
• Exploring Opportunities: Industries in Canada  
• Doing research on industries  
• Discuss the Entrepreneurship Final Report due a week after Module 12 | |
| Nov 4  | | | |
| **Operations: Organizational structure & behaviour, processes & process improvement** | | | |
| Nine   | • Determine one’s role and authority within an organization  
• Determine where value is added, and where it should be added  
• Apply tools to deliver Projects, maintain and improve Operations | • Organizational structure & governance  
• Project governance: lifecycle &approvals, methods eg Agile, CMMI  
• Operations Management: value stream mapping, process flow, Lean/Six Sigma  
• Change Management | |
| Nov 11 | | | |
| Ten    | • Integrate Marketing with Finance, Operations, Procurement and Supply Chain activities | • Trade / value chains  
• Procurement and Supply Chain Management, including Distribution  
• Tendering process, contracts, product & professional liability, trade secrets | |
<p>| Nov 18 | | | |</p>
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<tr>
<td><strong>Eleven</strong>&lt;br&gt;Nov 25</td>
<td>• Develop Discovery and Delivery skills&lt;br&gt;• Develop a detailed Business Case and statement of cash flows</td>
<td>• Discovery and Delivery skills&lt;br&gt;• Components of a detailed business case</td>
<td>Business idea:&lt;br&gt;Team project&lt;br&gt;15% grade weight</td>
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<td><strong>Twelve</strong>&lt;br&gt;Dec 2</td>
<td>• If I am the solution: what is the problem (job) I could solve?&lt;br&gt;• Is there a problem (job) for which I could be the solution?</td>
<td>• Legal and regulatory requirements&lt;br&gt;• Registering your business: BIN, HST, WSIB, name&lt;br&gt;• Liability insurance&lt;br&gt;• Engineering licenses&lt;br&gt;• Other professional certifications&lt;br&gt;• Personal finance: growing your money&lt;br&gt;• Self / Business marketing:&lt;br&gt;• Social intelligence, mentors&lt;br&gt;• Motivation, serendipity&lt;br&gt;• Social media, digital marketing&lt;br&gt;• Resume/interview&lt;br&gt;• Professional networking&lt;br&gt;• Entrepreneurship as a lifestyle choice</td>
<td>Create a viable business idea:&lt;br&gt;Write a business case &amp; benefits delivery plan&lt;br&gt;Team selects idea, instructor approves</td>
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Please ask your instructor if you would like a special topic to be discussed.
# Learning Outcomes

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<tr>
<th>Degree Level Expectation</th>
<th>Weight</th>
<th>Assessment Tools</th>
<th>Outcomes</th>
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| **Depth and breadth of knowledge**        | 20%    | • Individual and Team assignments  
• Individual class contributions          | • Awareness of important current business topics, and understanding of the following:  
  o Business Sustainability  
  o Financial Statements  
  o Project Finance and Business Cases  
  o Marketing and Operations activities  
  o Entrepreneurship and Business Management |
| **Research & scholarship**                | 15%    | • Individual and Team assignments  
• Individual class contributions          | • Ability to logically analyze business issues using established techniques, and using personal research beyond the course material  
• Ability to make business recommendations and decisions which consider uncertainty and alternative outcomes  
• Ability to evaluate the effectiveness of business recommendations and decisions, based on actual outcomes, and re-adjust actions |
| **Application of knowledge**              | 20%    | • Individual and Team assignments  
• Individual class contributions          | • Apply the above knowledge and research to make plausible and suitable recommendations for action  
• Apply the above knowledge and research to gain commitment and resources from decision-makers to enable the recommendations |
| **Professional capacity & autonomy**      | 20%    | • Individual and Team assignments  
• Individual class contributions          | • Awareness of academic integrity & professionalism  
• Ability to implement the provided course materials  
• Present own ideas and conclusions with logic  
• Integrate personal reflection into learning process |
| **Communication skills**                  | 20%    | • Individual and Team assignments  
• Individual class contributions          | • Ability to communicate oral and written ideas, issues, results and conclusions clearly and effectively  
• Ability to show critical thinking, follow instructions, apply principles of good report-writing and organization |
| **Awareness of limits of knowledge**      | 5%     | • Individual and Team assignments  
• Individual class contributions          | • Awareness of when to make reasonable assumptions, versus when to research new information  
• Ability to acknowledge personal limitations in resolving uncertainty |
### ASSESSMENTS

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<tr>
<th>Assessment type</th>
<th>Material covered</th>
<th>Due Date</th>
<th>Weight</th>
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<tbody>
<tr>
<td>Individual class contribution # 1</td>
<td>Modules 2 - 5</td>
<td>In class, real time, each module</td>
<td>10%</td>
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<tr>
<td>Individual class contribution # 2</td>
<td>Modules 6 – 12</td>
<td>In class, real time, each module</td>
<td>20%</td>
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<td></td>
<td>Feedback on Modules 2 - 5</td>
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<tr>
<td>Finance Individual report</td>
<td>Modules 1, 3, 4, 5</td>
<td>Preliminary outline due end of day Module 4 class</td>
<td>25%</td>
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<td>Final report due one week after Module 5 completes</td>
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<tr>
<td>Marketing and Operations Individual report</td>
<td>Modules 1, 6 - 10</td>
<td>Preliminary outline due end of day Module 7 class</td>
<td>20%</td>
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<td>Feedback on Finance report</td>
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<td>Final report due one week after Module 11 completes</td>
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<tr>
<td>Entrepreneurship Team report #1</td>
<td>Modules 1 and 2</td>
<td>Two weeks after Module 2 completes</td>
<td>10%</td>
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<tr>
<td>Entrepreneurship Team report #2</td>
<td>All Modules 1 - 12</td>
<td>One week after Module 12 completes</td>
<td>15%</td>
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<td></td>
<td>Feedback on Team Entrepreneurship report #1</td>
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**Activities in which collaboration is permitted**

- Individual in-class contributions and discussion
- Entrepreneurship team report #1 (within the project team)
- Entrepreneurship team report #2 (within the project team)
- Discussing with peers how to research and write an individual report (non-graded)
- ‘Study groups’ and researching course topics (non-graded)

**Activities in which students must work alone (collaboration is not permitted)**

- Finance individual report
- Marketing & Operations individual report
- Individual in-class contribution: any written work submitted to the instructor

**COURSE MATERIALS AND TEXTBOOK:**

- No required text or cases to purchase. Essential and recommended readings are provided in OWL.
GRADING STANDARDS

General Expectations

• Student’s work and class contributions are evaluated on what would reasonably be expected of a Masters-level student who, upon graduation from their program, would demonstrate the skills shown in the Ontario Qualifications Framework http://www.tcu.gov.on.ca/pepg/programs/oqf/certificate12.html
• Written work is evaluated on three criteria: critical thinking, analysis and insight; following instructions; organization and grammar. Specific rubrics may apply on any particular report.
• Class contributions are evaluated on criteria which emulate the professional workplace.
• The detailed rubrics on which written reports and contributions are evaluated, are provided in OWL.

Team Project Grades

• We provide guidance on how to be personally successful when working in teams.
• When working on team projects, all individuals will normally receive the same grade.
• In the event students feel that another team member is not a positive contributor, students are requested to respectfully resolve matters with the team member. If after drawing someone’s attention to their ineffective contribution and their behaviour continues, students may discuss concerns with the instructor at the earliest opportunity.
• After consulting the students concerned and considering whether a student’s behaviour likely affected a team’s performance, the instructor may adjust course grades for any or all individuals in the team.

Penalties - Written Reports and Presentations

• Late reports or presentations are subject to penalties of 25% of assignment grade weight per calendar day. Reports or presentations which are five calendar days late or more, may receive a zero grade.
• Penalties are waived for legitimate and documented reasons such as illness.

Penalties - Contributions

• Interactions with others during and outside class must be professional, or the student’s contribution grade may be reduced. There is no penalty for disagreement or difference of opinion.
• Students who do not attend a particular class, will not receive the Contribution grade for that class.
• Students who advise the instructor in advance of any planned absence may, at the instructor’s discretion, receive credit for the Attendance portion of the Contribution grade. Such students who request eligibility for the full Contribution grade will be asked to complete a written report on the topic of the day.
• Students with legitimate unplanned absences, and who provide supporting documentation afterwards, may also receive credit for the Attendance portion of the grade.

Requests for Academic Consideration

• If for a legitimate reason, you are unable to meet your academic responsibilities, or cannot meet due dates, please discuss with your instructor. Your instructor will not ask you for any confidential information.
• The formal Western University process is explained in the next two pages.
CHEATING, PLAGIARISM, ACADEMIC OFFENSES

Academic integrity is an essential component of learning activities. Students must have a clear understanding of the course activities in which they are expected to work alone (and what working alone implies) and the activities in which they can collaborate or seek help; see information above and ask instructor for clarification if needed. Any unauthorized forms of help-seeking or collaboration will be considered an academic offense. University policy states that cheating is an academic offence. If you are caught cheating, there will be no second warning. Students must write their essays and assignments in their own words. Whenever students take an idea or a passage of text from another author, they must acknowledge their debt both by using quotation marks where appropriate and by proper referencing such as footnotes or citations. Plagiarism is a major academic offence. Academic offences are taken seriously and attended by academic penalties which may include expulsion from the program. Students are directed to read the appropriate policy, specifically, the definition of what constitutes a Scholastic Offence at the following website:
https://www.uwo.ca/univsec/pdf/academic_policies/appeals/scholastic_discipline_grad.pdf

All required papers may be subject to submission for textual similarity review to the commercial plagiarism-detection software under license to the University for the detection of plagiarism. All papers submitted for such checking will be included as source documents in the reference database for the purpose of detecting plagiarism of papers subsequently submitted to the system. Use of the service is subject to the licensing agreement, currently between The University of Western Ontario and Turnitin.com (http://www.turnitin.com).

CONDUCT

Students are expected to follow proper etiquette to maintain an appropriate and respectful academic environment. Any student who, in the opinion of the instructor, is not appropriately participating in course activities and/or is not following the rules and responsibilities associated with the course activities, will be reported to the Associate Dean (Graduate) (after due warning has been given). On the recommendation of the Department concerned, and with the permission of the Associate Dean (Graduate), the student could be debarred from completing the assessment activities in the course as appropriate.

HEALTH / WELLNESS SERVICES

As part of a successful graduate student experience at Western, we encourage students to make their health and wellness a priority. Western provides several health and wellness related services to help you achieve optimum health and engage in healthy living while pursuing your graduate degree. Information regarding health- and wellness-related services available to students may be found at http://www.health.uwo.ca/. Students seeking help regarding mental health concerns are advised to speak to someone they feel comfortable confiding in, such as their faculty supervisor, their program director (graduate chair), or other relevant administrators in their unit. Faculty of Engineering has a Student Wellness Counsellor. To schedule an appointment with the counsellor, contact Kristen Edwards (khunt29@uwo.ca) via confidential email and you will be contacted by our intake office within 48 hours to schedule an appointment.
HEALTH / WELLNESS SERVICES CONTINUED

Students who are in emotional/mental distress should refer to Mental Health@Western: http://www.uwo.ca/uwocom/mentalhealth/ for a complete list of options about how to obtain help.

SICKNESS

Students should immediately consult the Instructor (for a particular course) or Associate Chair (Graduate) (for a range of courses) if they have problems that could affect their performance. The student should seek advice from the Instructor or Associate Chair (Graduate) regarding how best to deal with the problem. Failure to notify the Instructor or the Associate Chair (Graduate) immediately (or as soon as possible thereafter) will have a negative effect on any appeal. Obtaining appropriate documentation (e.g., a note from the doctor) is valuable when asking for accommodation due to illness.

Students who are not able to meet certain academic responsibilities due to medical, compassionate or other legitimate reason(s), could request for academic consideration. The Graduate Academic Accommodation Policy and Procedure details are available at: https://www.eng.uwo.ca/graduate/current-students/academic-support-and-accommodations/index.html

ACCESSIBLE EDUCATION WESTERN (AEW)

Western is committed to achieving barrier-free accessibility for all its members, including graduate students. As part of this commitment, Western provides a variety of services devoted to promoting, advocating, and accommodating persons with disabilities in their respective graduate program.

Graduate students with disabilities (for example, chronic illnesses, mental health conditions, mobility impairments) are strongly encouraged to register with Accessible Education Western (AEW): http://academicsupport.uwo.ca/accessible_education/index.html

AEW is a confidential service designed to support graduate and undergraduate students through their academic program. With the appropriate documentation, the student will work with both AEW and their graduate programs (normally their Graduate Chair and/or Course instructor) to ensure that appropriate academic accommodations to program requirements are arranged. These accommodations include individual counselling, alternative formatted literature, accessible campus transportation, learning strategy instruction, writing exams and assistive technology instruction.