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Crummer Graduate School of Business Minutes and
Reports

Faculty Minutes and Reports

1-16-2018

Minutes, Crummer Graduate School of Business Faculty Meeting, Tuesday, January 16, 2018

Crummer Graduate School of Business Faculty

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**Roy E. Crummer Graduate School of Business
Rollins College
Crummer Faculty/Staff Meeting Agenda**

**January 16, 2018
Room 107
11:30am – 1pm**

Approval of Minutes.....Deborah Crown

Faculty Recruitment Update.....Deborah Crown/Misty Loughry/Bill Seyfried

CFO/CIO Update.....Deborah Crown

Fundraising/Building Update.....Deborah Crown

EMBA Update.....Jim Johnson

Curriculum Committee.....Halil Kiyamaz

Discussion about EAMBA/PMBA Curriculum.....Bill Seyfried

Other Business.....

Meeting Adjourned.....Deborah Crown

**Roy E. Crummer Graduate School of Business
Rollins College
Crummer Faculty/Staff Meeting Agenda**

**January 16, 2018
Room 107
11:30am – 1pm**

Those Present: Nana Amoah, Mary Conway Dato-on, Bill Grimm, Kim Jentsch, Jim Johnson, Mark Johnston, Tracy Kizer, Misty Loughry, Greg Marshall, Pete McAlindon, Craig McAllaster, Kyle Meyer, Tim Ozcan, Bill Seyfried, Koray Simsek, Greg Turkanik, Keith Whittingham Keenan Yoho, Lynda Boyce, Jackie Brito, Pam Clark, Cari Coats, Deborah Crown, Mike Kazazis, Margaret Linnane, Dawn Nagy, Wes Naylor, Eric Scalamonti, Jane Trnka and Provost, Susan Singer

Approval of Minutes.....Deborah Crown

Faculty Recruitment Update.....Deborah Crown/Misty Loughry/Bill Seyfried

- An offer was made to Michael Goldsby for the management position. Unfortunately, he was unable to accept our offer.
- We are starting an Economics search. Out of 50 apps we have it down to two candidates that will be here the last week of the month.

CFO/CIO Update.....Deborah Crown

- We have hired our CFO, from Davidson college starting on July 1st
- Pat Schoknecht has moved to a VP job
- Troy Tomason is the interim CIO
- We are working on a Library Director. There will be presentation in the coming weeks
- Director of Intuitional analytics started today
- The registrar for all of Rollins has started to coordinate student records across campus
- We are in the process of hiring a new Dean of the Holt School through strategic planning going forward for the school
- Eric Spiegel has agreed to be our commencement speaker in May

Fundraising/Building Update.....Deborah Crown

- Continued thank you for your work on the building committee
- Fisher has collateral in process (Draft) at this point
- The Crummer and Museum visions are coming together. We are working on how to pull the triangle together
- Faculty, Staff, and Students will continue to have input as we move forward
- If you have not made your Crummer donation, please see Millie.

EMBA Update.....Jim Johnson

- A flyer was passed out on the new EMBA program
- Keenan, Bill Misty Nana and Cari will be teaching the first sessions
- The website went live and radio ads have started
- 34 companies are our corporate partners
- 25 is our target enrolment
- 15 people attended the online info session last week
- 6 were interested in the EMBA program
- 28 requests have come in for information on the EMBA program
- 5 Applications are in progress
- Feb 7th is the next info session
- Next month we are planning to invite Corporate partners for a meeting at the Alford Inn to discuss opportunities for not only the EMBA but all programs.

Curriculum Committee.....Halil Kiymaz

- Elective Course Proposals
 - ENT 607 – Social Entrepreneurship
 - ENT 609 – Family Business in the 21st Century
 - ENT 611 Sales & Marketing for Entrepreneurs
 - MKT 618 – Customer Relationship Management
 - CAP 604 – Advanced Strategy Applications
 - CAP 611 & 612 – Integrative Capstone Experience
- The curriculum committee approved. Craig moved, all approved
- Course mapping for electives is in process now. March first is the deadline.

Discussion about EAMBA/PMBA Curriculum.....Bill Seyfried

- More elective has been offered since the 8 weeks, 2 credit hour schedule has been put into place.
- Mini breaks have been created to give the students breathing room
- We now need to evaluate what changes worked and what did not.
 - Co-curricular activities have dropped off with this schedule
 - We have not heard any complaints from Students
 - With little prep time in the first week and finishing up the last week prepping for the next class limits actual instruction to 6 weeks
 - Response positive from students
 - Not sure if they are getting enough content and reflection
 - Adding a third class to the PMBA Program making them have 4 classes was too much for them. They love the classes, hate the schedules.
 - Traveling during week 4 further limits the content of the 8 week course
 - When holidays impact courses, should we incorporate blended into these weeks? Or schedule a makeup day.
 - Knowing the trip dates in advance would assist how classes are handled here during that time.

- With 8 week courses are we giving them the MBA information need.
- January starts do not get a break until Christmas. Concerns about burnout
- Our two-credit course change will complete at the end of the term. We need to address any changes then.
- The discussion needs to continue to be ready for any changes we need to make
- What matrix are we learning to map assurance of learning?
- We need to look at other programs using 8 week courses and how they deal with some of our concerns.
- Carrying a Consulting project from Fall into Spring has had challenges
- Wish we had known the schedule when we voted on 2 credit hour courses
- We will have this program for at least one more year so we need to look at the major concerns to see if we can make some changes now.
 - Exit interviews could give us good information
 - Sibling interviews that have been through both programs 3 credit hours vs 2 credit hours
- Keenan, Tracy, Tim, and Nana to head up task force to consider matrix process and collecting information
- Possible the Course evaluations could give insight
- Mark, Kyle, and Josh. Adding Ethics into the curriculum

Other Business.....

Meeting Adjourned.....Deborah Crown

ENT 607 Social Entrepreneurship Spring 1 2018



Instructor: Dr. Mary Conway Dato-on
Course Dates: January 8 – February 26, 2108
Course Times: Tuesdays 1:00 – 4:00 p.m.

Room: 220

PHONE: 407-646-2514

E-mail: mconwaydatoon@rollins.edu

Course Description

This course is a survey of critical, contemporary innovative management models and methodologies encapsulated under the umbrella of social entrepreneurship. This growing area of graduate business education is viewed as imperative in preparing leaders of global enterprises. Social entrepreneurship is a rapidly developing and changing business field in which business and nonprofit leaders design, grow, and lead mission-driven enterprises with measurable social impact. As the conventional lines between nonprofit enterprises, government, and business blur, it is essential that managers understand the opportunities and challenges in this new landscape.

In this course, students will create a business to attack a social problem and thereby accomplish both social impact and self-sufficiency. The basic thesis of social entrepreneurship adopted in the course is that many social problems, if looked at through an entrepreneurial lens, create opportunity to launch a venture that generates profits by alleviating that social problem. This sets in motion a virtuous cycle of profit potential and improved society. Even if it is not possible to eventually create a profit-making enterprise, the process of striving to do so can lead to a resource-lean nonprofit entity.

The course takes an interdisciplinary approach to social entrepreneurship. As such, will discuss social ventures and social entrepreneurs from the following perspectives:

- **Sustainability** – How are social entrepreneurs funding their enterprises? How is the enterprise sustaining itself financially?
- **Impact and Performance** – What is the impact of the enterprise? Which tools are available to measure the impact and effectiveness of social enterprises?
- **Innovation** - How do social entrepreneurs create and spread innovation and change?
- **Leadership** - What are the characteristics of social entrepreneurs' leadership?

Course Objectives

At the end of the course, students can expect to:

- Analyze the field of social entrepreneurship and opportunities, challenges, and issues facing social entrepreneurs
- Interact with leading social entrepreneurs who are using business skills to address complex social problems.
- Enact a business plan for a social venture

Grading

Percentage	Assignments/Deliverables
15	Constructive engagement (including Quizzes, in-class assignments)
5	Individual site visit & reading report
20	Individual Reading Reports (10% each)
20	Individual Case Analysis (10% each)

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10	Team ¹ Book Interactive Session
30	Team Social Entrepreneurship Project
100	TOTAL

Grading Scale

	PERCENTAGE*	DESCRIPTION
A	93-100	Indicates consistently excellent work, executed to a professional standard. Consultant quality - in other words, someone would pay you for it.
A-	90-92	Indicates consistently excellent work, superior to the expectations of a graduate student.
B+	87-89	Indicates work of the quality normally expected of a graduate student
B	83-86	
B-	80-82	Indicates work that is below the quality expected in graduate study
C+	77-79	Indicates work that is below the quality expected in graduate study, with particular disregard for assignment requirements, failure to demonstrate critical thinking, and /or poor writing
C	73-76	
C-	70-72	
F	69 or below	Indicates work that is unacceptable in graduate level of study. May also result from failure to submit course requirements in timely manner
I	Incomplete	Indicates that at the instructor's discretion and prior to semester's end, the student and instructor have agreed that outstanding work will be completed and the grade changed to A, B, C or F by the mid-term of the following semester

*Normal mathematical rounding applies (e.g., 89.4 = 89; 89.5 = 90)

Instructional Materials

1. *What a Great Idea* by Chic Thompson – completed by Jan 22
2. *Creative Confidence* by David M. Kelley and Tom Kelley – completed by Jan. 30
3. *Measuring and Improving Social Impacts: A Guide for Nonprofits, Companies, and Impact Investors* by Marc J. Epstein and Kristi Yuthas – see chapter reading assignments in course schedule
4. A packet of cases and articles has been compiled for this class. Additional readings will be posted on Blackboard. Harvard Course Packet download instructions will be emailed & available on BB. It is not permissible to photocopy another student's cases or articles: this is infringement of copyright and it is illegal.

Disability Accommodation

Rollins is committed to equal access and does not discriminate unlawfully against persons with disabilities in its policies, procedures, programs or employment processes. The College recognizes its obligations under the Rehabilitation Act of 1973 and the Americans with Disabilities Act of 1990 to provide an environment that does not discriminate against persons with disabilities. If you are a person with a disability on this campus and anticipate needing any type of academic accommodations in order to participate in your classes, please make timely arrangements by disclosing this disability in writing to the Disability Services Office at (box 2613). Should you have questions, concerns or need support related to Accessibility Services, please call 407-975-6463 or email Access@Rollins.edu.

¹ Individual student's grades for team assignments will be determined by the score his/her team receives, adjusted by a peer review rating of individual contribution

TITLE IX STATEMENT

Rollins College is committed to making its campus a safe place for all. If a student tells a faculty or staff member about sexual misconduct involving members of the campus community, they are required to report this information to the Title IX Coordinator, Oriana Jiménez (TitleIX@rollins.edu or 407-691-1773). If you have any questions or concerns regarding this statement or policy, contact the Title IX Coordinator. If you would prefer to speak to someone on campus confidentially, call the Wellness Center at 407-628-6340. They are not required to report any information you share.

Sexual misconduct includes sexual harassment, stalking, intimate partner violence (such as dating or domestic abuse), sexual assault, and any discrimination based on your sex, gender, gender identity, gender expression or sexual orientation that creates a hostile environment. For information, visit <http://www.rollins.edu/titleix/>

Crummer Academic Integrity Policy

As stated in the *Crummer Graduate School of Business Academic Integrity Policy*, faculty, students and staff are expected to uphold the highest level of ethical standards. This course requires that all students meet expectations of scholastic honesty. Plagiarism, collusion, or cheating in any form will not be tolerated. Failure to abide by these standards will result in full punishment as prescribed by the *Policy*. (<http://www.rollins.edu/business/student-services/student-academics/student-handbook.html>)

Descriptions of Assignments/Deliverables

Constructive Engagement (15%): Not to be confused with attendance or *quantity* of comments, constructive engagement is the practice of engaging guests, professor and peers during presentations and discussions with thoughtful and timely contributions. Announced and unannounced activities and quizzes will also be given as a part of this deliverable.

TIPS for Maximizing Engagement Grade:

- Please make every effort to be recognized by the discussion facilitator (rather than speaking out of turn). Many cultures and communication styles find it difficult to interject into active communications. *Being recognized before you contribute allows all to have a turn.*
- **Opinions vary; civility is constant.** Everyone should feel free to question or disagree with others; however, such disagreement must be based on the idea and not the person. Respect for each other is the *sine qua non* of great discussions and resulting learning experiences.

L = Look interested - get interested
I = Involve yourself by responding
S = Stay on target
T = Test your understanding
E = Evaluate the message
N = Neutralise your feelings

<http://www.faculty.londondeanery.ac.uk/listeni>

Individual Site Visit & Reading Report (5% - due prior to week 3 class)

In lieu of a face-to-face class meeting in Week 2, each student will individually visit a social enterprise of her/his choice, or attend one of the Candy Chang events as part of Rollins' MLK week.

DELIVERABLE: Taking this visit/activity into account and reflecting on Week 2 assigned readings, submit a 2-page reflective writing assignment (single-spaced 11 pt. fonts, 1" margins, references and tables/figures/pictures may be added as appendices). Students are encouraged to be creative in their submission; at a minimum, the assignment should address the following:

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1. Description of the social enterprise visited including a brief explanation of mission and social entrepreneur profile, incorporate details on what you did while you visited the enterprise
2. Explanation of why you selected to visit this particular enterprise (or participate in activity)
3. Application / Integration / Analysis of the readings as they relate to the activity

CASES Individual Written Analysis (20% - 2 @ 10% each)

Each student will write 2 case analyzes. **NO** external research should be conducted for the case analysis. Only information presented in the case and articles/books already read for class should be used in developing the analysis. Submission are **due prior to class on the day the case is discussed**. **NO late submissions will be accepted**. Review supplemental articles / slides on BB for case analysis tips.

DELIVERABLE: Maximum length of 2 pages (single-spaced 11 pt. fonts, 1" margins, references and tables/figures may be added as appendices). Grading is based on quality of the following:

	Focus Area	Points
1.	Brief introduction of case situation (who, when, where)	10
2.	Situational Factors (3-5) that influence case decision or problem statement	20
3.	Problem Statement (do not include context from case)	10
4.	Explanation of 3 possible alternatives to identified problem	30
5.	Recommended solution with brief justification	20
6.	Correct grammar, spelling, professional presentation (points deducted for failure to put name on assignment)	10
	TOTAL	100

Cases

1. Jane's short & sweet: Week 5
2. MIA: Week 7

Individual Readings Reports (20% - 10% each)

Each student will submit two readings reports, which summarize the key insights obtained from the readings and the degree to which they applied to the team's social enterprise. The goal of this assignment is twofold. One objective (quite frankly) is to ensure that students are reading the articles/book. The second objective is to assess each individual's ability to think critically and write cohesively.

- DELIVERABLE: Maximum length of 4 pages (single-spaced 11 pt. fonts, 1" margins with citations on separate page). See Course Schedule for due dates - **NO late submissions will be accepted**.

Grading for Reading Reports:

	Focus Area	Points
1.	<i>Analysis</i> of content based on tools & concepts from this course and other MBA courses	30
2.	<i>Integration</i> of readings without resorting to simplistic summary of content	30
3.	<i>Application</i> of concepts from readings to SE visits and SE project	30
4.	Correct grammar, spelling, professional presentation (points deducted for failure to put name on assignment)	10
	TOTAL	100

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Team Project #1 – Book Interactive Activity (10% - due date based on selected book)

- Organize yourselves into teams of four (4) – or five (5). Submit team structure and prioritized book selection² via email (copy entire team) prior end of class on Week 1 class. Professor will notify team of book assignment before start of week 2.
- DELIVERABLE: a 20-minute (maximum) **interactive** team presentation on the book's content and how it connects to the course and assigned readings.
- In designing the presentation, keep the following in mind:
 - It is probable that many classmates have not read the book. We are all familiar with assigned readings, however. Thus, the presentation should provide enough content on the book to aid in connecting the book to the readings.
 - An interactive presentation incorporates touch points with the audience (i.e., it is not a lecture) and includes elements of **creativity** from both presenters and audience. Feel free to incorporate activities that ask fellow participants to think critically and use their judgment.

Book Selection for assignment is on a first-come, first-serve basis. Below is the selection of books to choose from. Each team selects one book and presents on the date assigned.

1. *How to change the world: Social entrepreneurs and the power of new ideas* by David Bornstein.
2. *Social Entrepreneurship: What everyone needs to know* by David Bornstein and Susan Davis.
3. *Rippling: How social entrepreneurs spread innovation throughout the world* by Beverly Schwartz and Bill Drayton.
4. *The B Corp Handbook: How to use business as a force for good* by Ryan Honeyman, Jay Coen Gilbert, Bart Houlahan (Foreword), and Andrew Kasoy
5. *The Power of unreasonable people: How social entrepreneurs create markets that change the world* by Elkington, John and Pamela Hartigan
6. *Getting beyond better: How social entrepreneurship works* by R.L. Martin, and S.R. Osberg
7. *The unfinished social entrepreneur* by Jonathan Lewis

Grading for Book Interactive Activity:

	Focus Area – not necessarily the presentation order	Points
1.	Brief summary of book content – emphasizing connection to required readings and class activities	15
2.	Key learning(s) from book – think about a 'top 10' of what every social enterprise should learn from this book or why every social entrepreneur should read this book	15
3.	Depth of analysis – demonstration of MBA-level critical thinking	20
4.	Creativity and professional integration of interactive elements	30
5.	Quality of presentation (including teamwork, slide appearance, timing)	20
	TOTAL	100

Team Project #2 – Social Enterprise Business Plan / Implementation (30%).

The development of business plans for societal entrepreneurship ventures poses a significant challenge. Unlike an entrepreneurial project, where the prime purpose is the creation of a rent-generating

² If the team wishes to select a book not on the list, they must do so **in writing at least two-weeks prior** to the day the book will be presented to the class

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enterprise, in this course we will be looking at dual pursuit of social wealth alleviation and income generation followed by the development of and potential enactment of a dual objective business plan. Thus, a major component of the course is for teams of students to develop a Social Enterprise Business Plan / Implementation based on the two options offered in Week 1.

- DELIVERABLES: all due Week 8
 - Social business model canvas
 - One-page business plan
 - 10-minute presentation on implementation to-date, or planned

Course Schedule

Session & Topic	Readings and Cases
WEEK 1: January 8	
Class will meet in Rollins Social Innovation & Entrepreneurship Hub located in Mills Hall 1 st floor	
<ul style="list-style-type: none"> • Class Overview • Design Thinking 	<ol style="list-style-type: none"> 1. Watch: The New Social Entrepreneurs www.youtube.com/watch?v=DttTSJE047g 2. Visit: Designing for a Circular Economy http://www.bbc.com/future/gallery/20171212-the-intriguing-world-of-circular-design?ocid=ww.social.link.email 3. Visit: 7 Tips for Brainstorming https://challenges.openideo.com/blog/seven-tips-on-better-brainstorming 4. Visit: BoP Innovation Center, http://www.bopinc.org/
WEEK 2: Jan 15	
Witness social entrepreneurship in action	
<ul style="list-style-type: none"> • Individual site visit or Candy Chang event (see required submission) • Team meeting to select project focus • Readings as assigned • Submit individual site visit & reading report prior to start of class on WEEK 3 	<p>Candy Chang events on January 18 - Options:</p> <ol style="list-style-type: none"> 1. 4-5PM in Suntrust Auditorium or 2. Public Event @ 7:30 PM Tiedtke Concert Hall in inside the Keene Music Building, next door to the Alford Sports Center. To reserve your tickets, contact the Rollins box office at BoxOffice@rollins.edu or 407-646-2145 or 3. Participate in art installation <p>Read:</p> <ol style="list-style-type: none"> 1. Martin R.L., Osberg S. 2007. "Social entrepreneurship: the case for definition," <i>Stanford Social Innovation Review</i>, 5(2): 28-39. (on BB) 2. Dees and Backman, "Social Enterprise: Private Initiatives for the Common Good," Harvard Business School note #9-395-116 3. Conway Dato-on 2018 "Defining Social Entrepreneurship: Will I know it when I see it?" (on BB)

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WEEK 3: Jan 22 Acting on the Idea(s)	
<ul style="list-style-type: none"> • Skype session with Chic Thompson – creative thinking to address social issues • Defining Social Entrepreneurship • Social entrepreneurship, NPO, CSR and commercial entrepreneurship 	<p>READ</p> <ol style="list-style-type: none"> 1. Complete reading of <i>What a Great Idea</i> 2. <i>Measuring and Improving Social Impacts</i> <u>Part 1</u>: What will you Invest? <p>Book Interactive Exercise 1: <i>How to change the world: Social Entrepreneurs and the Power of New Ideas</i> AND/OR <i>Social Entrepreneurship: What everyone needs to know</i></p>
WEEK 4: Jan 29 * Developing the social business model	
<ul style="list-style-type: none"> • Social Business Model Canvas 	<p>Complete reading of <i>Creative Confidence</i></p>
WEEK 5: Feb 5 Challenges of starting and running a social enterprise	
<ul style="list-style-type: none"> • Ron Ben-Zeev of Global Housing Solution – in class presentation • Case Analysis 	<p>DUE: Individual Readings Report 1</p> <p>Book Interactive Exercise 2: <i>The Power of Unreasonable People: How Social Entrepreneurs Create Markets that Change the World</i> AND/OR <i>Getting Beyond Better: How Social Entrepreneurship Works</i></p> <p>READ: <i>Measuring and Improving Social Impacts</i> <u>Part 2</u>: What Problems will you Address?</p> <p>CASE: Jane's short & sweet</p>
WEEK 6: Feb 12 Activating the Social Business Plan	
<ul style="list-style-type: none"> • Setting goals • What does 'success' look like? • Incremental social change with ongoing financial stability 	<p>Book Interactive Exercise 3: <i>Rippling: how social entrepreneurs spread innovation throughout the world</i></p> <p>READ:</p> <ol style="list-style-type: none"> 1. <i>Measuring and Improving Social Impacts</i> <u>Part 3</u>: What Steps will you take & 2. <i>Measuring and Improving Social Impacts</i> <u>Part 4</u>: How will you measure success? 3. Impact Investing: A Short Guide (on BB) 4. What you need to know about impact investing (on BB)

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WEEK 7: Feb 19 Tensions of dual missions	
<ul style="list-style-type: none">Legal structure as capacity building	<p>Book Interactive Exercise 4: <i>The B Corp Handbook: How to Use Business as a Force for Good AND/OR The Unfinished Social Entrepreneur</i></p> <p>READ:</p> <ol style="list-style-type: none"><i>Measuring and Improving Social Impacts Part 5:</i> How can you increase impact?Conway Dato-on and Easter (2013) Chapter: (on BB) <p>CASE: MIA</p>
WEEK 8: Feb 26 Ensuring continued success of the social enterprise	
Team Presentations	<p>DUE:</p> <ol style="list-style-type: none">Social Enterprise Business Plan / ImplementationIndividual Readings Report 2Peer Evaluations using CATME – submit within 48 hours of final class

Recommended Reading

The following books and articles, while not required, are worth reading for a deeper understanding of global marketing:

Business built on values:

- “Raising the Bar: Integrity and Passion in Life and Business: The Story of Clif Bar,” By Gary Erickson.
- “Do the KIND Thing: Think Boundlessly, Work Purposefully, Live Passionately” by Daniel Lubetzky
- “Ben & Jerry's: The Inside Scoop: How Two Real Guys Built a Business with a Social Conscience and a Sense of Humor” by Fred Lager

Overviews of the Field:

- “People, Planet, Profits” by Fisk, Peter (2010). Kogan Page Publishers
- “The New Entrepreneurial Leader: Developing Leaders who shape social and economic opportunity by Danna Greenberg, Kate McKone-Sweet, H. James Wilson
- “Social Entrepreneurship for the 21st Century: Innovation Across the nonprofit, Private and Public Sectors” by Georgia Levenson Keohane
- “*Change by Design* (HarperCollins, 2009) by Tim Brown (of IDEO)

Textbooks:

- “Understanding social entrepreneurship: The relentless pursuit of mission in an ever change world” by Jill Kickul and Thomas S. Lyons.
- “Business planning for enduring social impact: A social entrepreneurial approach to solving social problems” by Andrew Wok and Kelley Kreitz.
- “Managing and measuring social enterprise” by Rob Paton.

International viewpoints

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1. "The Fortune at the Bottom of the Pyramid" by C.K. Prahalad.
2. "Entrepreneurial Solutions for Prosperity in BoP Markets" by Eric Kacou.
3. "Base of the Pyramid 3.0: Sustainable Development through Innovation and Entrepreneurship" by Fernando Casado Caneque and Stuart L. Hart

Useful Websites

Social Entrepreneurship

- Social Enterprise Coalition – (<http://www.socialenterprise.org.uk>)
- SEEP Network – (<http://www.seepnetwork.org>).
- Center for the Advancement of Social Entrepreneurship (CASE) at Duke University's Fuqua School of Business (<http://www.fuqua.duke.edu/centers/case>)
- Next Billion – a project of the World Resources Institute (www.NextBillion.net)
- Change Makers - (<http://www.Changemakers.net>) by Ashoka.
- The Skoll Foundation's Social Edge (<http://www.socialedge.org/>).

CSR

- B Corporation <http://www.bcorporation.net/>
- Boston College Center for Corporate Citizenship. <http://www.bccccc.net/>
- Bridgestar <https://www.bridgestar.org/Resources/Library/Lead/EDCOOPartner.aspx>
- Business and Human Rights www.business-humanrights.org
- Business for Social Responsibility www.bsr.org
- Business in the Community www.bitc.org.uk
- Business Respect – CSR newsletter newsletter@businessrespect.net
- Carbon Disclosure Project Report <http://www.cdproject.net/>
- The Center for Corporate Citizenship at Boston College www.bc.edu/cccr
- Center for Global Development <http://www.cgdev.org/>
- Center for High Impact Philanthropy (CHIP) <http://www.impact.upenn.edu/>
- Ceres <http://www.ceres.org/>
- Committee to encourage corporate philanthropy – US www.corphilanthropy.org
- Cone LLC - <http://www.coneinc.com/>
- Conference Board www.conference-board.org
- Corporate Social Responsibility Forum www.pwblf.org
- CSR Europe www.csreurope.org
- FTSE4Good Index www.ftse4good.com
- The Global Compact www.unglobalcompact.org
- Global Reporting Initiative www.globalreporting.org
- Global 100 (<http://www.global100.org/2009/index.asp>)
- The Good Business Network www.thegoodbusinessnetwork.com



Course Syllabus for:

FAMILY BUSINESS IN THE 21ST CENTURY

ENT-609 Spring 2 - 2018

PMBA - 2 Credit Hours

6:30 – 9:30 p.m. Monday – Room 220

Dr. Paul Kegel

pkegel@rollins.edu

COURSE DESCRIPTION:

Family owned businesses are growing in the US and around the world. They comprise 80-90% of all businesses and cover the spectrum of small mom and pops to multi-billion dollar, complex, global enterprises. Families control 35% of Fortune 500 companies. Regardless of the size, family businesses have long been and continue to be an economic engine. The origins of these family enterprises are often entrepreneurial and, as a result, these families can expand their holdings from the original operating business to other entities, including trusts, investment funds, holding companies, family offices, and charitable foundations. Given the dominant presence of family enterprises in the business world, students of business are likely to encounter, work for, work with, or be a member of a business family. While family enterprises can have much in common with non-family, private or publicly held companies, there are characteristics that are unique only to family businesses. This course is an introduction to the basic concepts specific to family enterprises such as governance, ownership structures, values-based decision making, succession planning, intra-family conflict management and inter-generational dynamics, and will give students the understanding of the challenges and opportunities of family enterprises in order to be informed employees, owners and/or shareholders.

COURSE OBJECTIVES:

- Understand the qualities which typify family business
- Appreciate family businesses' unique capacities and potential for superior returns
- Identify and cope with foreseeable obstacles to continuity of a family business
- Understand the role of a formalized succession and generational transition plan
- Integrate entrepreneurial and professional management concepts for strengthening family business organizational performance over multiple generations
- Understand the importance of valuations, estate planning and other financial and wealth transfer strategies within the family enterprise context

COURSE PREREQUISITES:

None

COURSE RESOURCES

Textbook: Family Business by Ernesto J. Poza and Mary S. Dougherty, 4th edition

Outside Reading Materials: *TBD*

COURSE FORMAT:

This course involves weekly readings and lecture sessions that introduce and examine important topics in family business. Additionally, we will have several distinguished guest speakers from the world of family business

GRADING:

Your final course grade is based on your performance in the following areas:

- Class Participation and contribution	10%
- Family Business Interview	10%
- Speaker Reflection Exercises (5)	50%
- In-Class Article Presentation (team)	10%
- Course Exam	20%
TOTAL	100%

The following ranges should be used to determine grades for the module.

A	93-100%
A-	90-92.99%
B+	87-89.99%
B	83-86.99%
B-	80-82.99%
C+	77-79.99%
C	73-76.99%
C-	70-72.99%
F	Below 70%

Class Participation and Contribution:

Attendance is required for all classes. In extreme cases where you cannot attend, it is important that you notify your instructor in advance of the upcoming absence, so that a reasonable alternative assignment can be arranged.

Students are expected to actively participate in class discussions each week. Good participation is defined as:

- On time and present in each class
- Actively participate in class discussions, pulling in insights from experience and readings
- When guests are in the room, be respectful and prepared with thoughtful questions
- Unauthorized device usage (phones, laptops) will take away from your participation grade

Family Business Interview:

Students will individually conduct an interview with an executive of a family business that is NOT from their own family. The interview should cover many of the major concepts addressed in the class. A brief outline will be presented early in the semester which will serve as a guideline for the interview.

Speaker Reflection Papers:

We will have several distinguished guest speakers throughout the course. Following each guest speaker, students will prepare a 2-page (minimum) paper or a 3-5 minute narrated video reflecting on insights and comments of the speakers and apply course concepts.

In-Class Article Presentation (team):

Teams will be randomly selected and will prepare an in-class presentation on an assigned Family Business academic article.

Final Exam:

There will be a final examination which covers all of the assigned text material. Exams will be roughly 40 questions, multiple choice format.

CRUMMER ACADEMIC INTEGRITY POLICY

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SPECIAL ACCOMMODATIONS

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TITLE IX STATEMENT

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TENTATIVE CLASS SCHEDULE

Week	Date	Topics	Activity
1	3/5/18	The Nature, Importance, and Uniqueness Of Family Business	Chapter 1
2	3/12/18	The Dynamics of Family Interactions and Effects on the Firm – Relationships	Chapter 2 Guest Speaker
3	3/19/18	The Dynamics of Family Interactions and Effects on the Firm – Culture & Gender	Article(s) Guest Speaker
4	3/26/18	Family Business Governance and Ownership - Decision and Leadership	Chapters 3 & 9 Guest Speaker
5	4/2/18	Succession and Transfer of Power Multi-Generational Firms	Chapters 6,7,8 Guest Speaker
6	4/9/18	Strategic Management of Family Business And Non-Family Employees	Chapters 10, 14 Guest Speaker
7	4/16/18	Estate Planning, Financial & Legal Issues	Chapters 11,12,13 Guest Speaker
8	4/23/18	Wrap up	Final Exam



**Crummer Graduate School of Business
Rollins College**

**Course Syllabus
Spring 2018, Module 1**

**Sales and Marketing Entrepreneurs
MKT 611
2 Credit Hours
Faculty Name: Ken Merbler
Classroom: Crummer Hall, Room 207**

**Office Location: None
Email Address: kmerbler@rollins.edu
Phone (Mobile): 650 269-7488**

Course Description and Objectives

This course provides an in-depth understanding of creating, communicating, and delivering value to customers of entrepreneurial ventures. Topics include in-depth analysis of customer need versus customer demand, managing the sales process, market research and sales promotion with limited resources, interpreting customer feedback in Beta trials, utilizing technology to optimize and automate components of the marketing and sales function, and developing and implementing a comprehensive go-to-market strategy.

Our objective is to provide students with a level of understanding of how entrepreneurial marketing and sales can be successfully implemented to achieve business goals and sustain relationships with profitable customers. Emphasis is placed on the insights and advice from successful entrepreneurs. In addition, we will explore the rapidly changing environment and the challenges faced in launching a start-up business.

Partial list of important topics covered:

- Using marketing to create a new business
- Identifying product or service application & the market
- Adoption, diffusion & understanding lead customers
- Competitive & market considerations
- The customer development process
- Developing a marketing & sales program
- The role of sales in customer development
- Sales and communication skills

Knowledge and Skills Students Expected to Master:

- Students will have a chance to examine the basics of a successful entrepreneurial venture
- Students will learn to develop an entrepreneurial marketing and sales plan
- Students will understand some of the essentials of marketing for a start-up business
- Students should be able pitch their product or service in a convincing manner to investors
- Students will have the knowledge of how to generate customer leads
- Students will understand the factors that give their business a chance for success

Course Resources

“Entrepreneurial Marketing – an effectual approach”, 2nd Edition, By Edwin J. Nijssen
Articles and Case Studies: Provided in Blackboard

Adjunct Professor

A brief biographical sketch of Ken Merbler is attached (Appendix A).

Case Write-up Requirements

General Instructions for “Mini-Case” and “Individual Case” Write-ups – Executive Summary Style (Appendix B)

Teaching Approach

This course is conducted in a “seminar” style, meaning that classes will normally include a combination of instructor-led discussions and in-class activities and exercises. Because the assigned textbook may be viewed as an important “springboard” for further discussion, classroom presentations will not be a mere rehash of the text material but will instead use it as a platform on which to build a deeper dialogue. This type of course requires that each week, every student come to class fully prepared to discuss the material that is relevant for that class period. In order to succeed in this course format, each student must be willing to contribute his/her ideas to the class discussion. I may call on you in class for feedback, so it is very important that you be prepared for the day’s assignments.

Below are outlined the various deliverables within the course:

Class Attendance, Participation and Contribution to Discussion

Your own contribution to the classroom discussion based on your own knowledge and your experiences is a critical part of the success of the course for everyone. I expect relevant, informed, interesting, and insightful comments from individuals in the class. This includes during full class discussion as well as during team breakout sessions. In all situations, be absolutely clear that quality of contribution rather than merely quantity of “talk time” is a key to your success. Be respectful of other students and avoid exhibiting dominating, one-way, and “shot from the hip” approaches to class discussion. It is your responsibility to attend class. Attendance directly factors into this category since, obviously, you cannot participate if you are not in class. Much of the learning in this course comes from in-class interactions and activities. This is not a distance-learning course or a self-study course. In this course there is no viable way to “make up” missed in-class learning opportunities.

Application Questions

In-class exercises using questions that directly apply to the chapters being discussed. **Some will be done individually and some will be by teams.**

In-Class Mini-Cases

We will explore some topics through entrepreneurial sales and marketing mini-cases. These mini-cases are an ***in-class team activity***. Each will come with its own instructions for approaching the issues. The specific deliverable will be explained at the time of the assignment. I may ask you to do a short extemporaneous presentation related to the mini-case. In order to be able to work on these *you must be up-to-date with the assigned readings on the day each is to be accomplished.*

Individual Cases

You will prepare two larger individual cases in executive summary format throughout the semester to allow for consideration of a number of important topical issues in entrepreneurial sales and marketing. Basic guidelines for preparing these appear in Blackboard – we will discuss the effective case process in more detail. It is of particular importance to note that the **cases are to be prepared individually by each student.** *Students are not to collaborate or work together in preparing these case studies.* These are due via Blackboard at the beginning of the class period.

Take-Home Final Exam

We will have a take-home final exam. This will be application oriented to allow you to demonstrate how well you can integrate what you have learned about entrepreneurial sales and marketing and apply it to managerially relevant situations. It is of particular importance to note that the take-home **final is to be prepared individually by each student**. *Students are not to collaborate or work together in preparing the take-home final*. It is due via Blackboard at the beginning of the class period on the due date.

Grading

The following ranges are used to determine grades for the term.

A	93-100%
A-	90-92%
B+	87-89%
B	83-86%
B-	80-82%
C+	77-79%
C	73-76%
C-	70-72%
F	Below 70%

Grading Points

A total of **100 points** will be available for the student. These may be earned as follows:

35%: Take Home Final**15%: Mini-Case Studies (Team) (8 Cases)****25%: Individual Case Studies (3 Cases)****10% Application Questions (1 set of questions per class)****15%: Class Attendance, Participation & Contribution****100%****Grade Computation**

Obviously, your grade in this course is based on a combination of individual and team related work. You must perform at a high level in both areas to receive an "A." On team industry analyses and in-class mini-cases there will be an overall team score for each project.

Blackboard

I will be utilizing the Rollins Blackboard to help manage the course. You will be able to get relevant information simply by logging into the blackboard site. Please turn all assignments in through the Blackboard. **IMPORTANT:** (1) Please don't simultaneously email assignments to me that you have placed into the Blackboard; (2) also, there's no need to provide a hard copy of assignments turned in on Blackboard except as I request.

Late Assignment Policy

Overall, please exhibit good planning and time management skills throughout the semester. I am not receptive to receiving assignments late. You will be turning in all assignments on the Blackboard only, which logs in day and time of posting. Specific due dates and times are indicated under the different assignment sections above.

Crummer Academic Integrity Policy

As stated in the Crummer School of Business Academic Integrity Policy, faculty, students and staff are expected to uphold the highest level of ethical standards. This course requires that all students meet expectations of scholastic honesty, particularly while taking exams. During in-class exams, you may not share any information, materials or electronic files with others. Collusion or cheating in any form will not be tolerated. Failure to abide by these standards will result in full punishment as prescribed by the Policy.

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Sexual misconduct includes sexual harassment, stalking, intimate partner violence (such as dating or domestic abuse), sexual assault, and any discrimination based on your sex, gender, gender identity, gender expression or sexual orientation that creates a hostile environment. For information, visit <http://www.rollins.edu/titleix/>

Changes to syllabus & Schedule:

Expect changes. I reserve the right to revise the class schedule, assignments, and evaluation plan. If this occurs, it is because I am making “real time” adjustments to enhance the structure the course and student performance. Students will be fully apprised of any such modifications.

Consulting with faculty. Any students who have difficulty in doing assignments, understanding learning materials, or working with group members should meet the instructor as soon as possible so that problems would be resolved in time. The instructor is more than happy to assist students; however, if one student misses a class, it is the student's responsibility to keep up with the progress by consulting fellow students or the instructor for topics covered in that class.

Backup whatever you do with the computer: Because many factors may corrupt the files in the computer storage, make backup copies of your homework all the time. The instructor is fully aware that life is full of unexpected events; however, “My computer broke,” “I saved the files, but they are gone now,” “Printers were out of ink,” “Computer labs were not open,” and so on are not acceptable. If you believe that your time is precious, then consider computer files of your homework are equivalently valuable: Always backup your computer work

CLASS SCHEDULE
FORMAT: On-Campus

WEEK OF	CHAPTERS	TOPICS AND OTHER READINGS	HOMEWORK AND OTHER ASSIGNMENTS
1 January 11	1 & 2 Articles In Blackboard	(1) Using Mkt to create new businesses with radically new ideas (2) Identifying an application & the market	Read Chapters 1 & 2 In-Class Mini-Case by Teams Application questions discussed by teams No Homework is due
2 January 18	3 Articles In Blackboard	Segmentation & positioning to maximize value of a new technology & product application	Read Chapter 3 & Do Individual case (1) posted in Blackboard – Turn-in to Blackboard before class starts Application questions discussed by teams
3 January 25	4 Articles In Blackboard	Adoption, diffusion & understanding lead customers	Read Chapter 4 In-Class Mini-Case by Teams Application questions discussed by teams No Homework is due
4 February 1	5 Articles In Blackboard	Competitive & market considerations	Read Chapter 5 & Do Individual case (2) posted in Blackboard – Turn-in to Blackboard before class starts Application questions discussed by teams
5 February 8	6 Articles In Blackboard	The customer development process	Read Chapter 6 In-Class Mini-Case by Teams Applications questions discussed by teams No Homework is due
6 February 15	7 Articles In Blackboard	Developing a marketing & sales program	Read Chapters 7 & Do Individual case (3) posted in Blackboard – Turn-in to Blackboard before before class starts Application questions discussed by teams
7 February 22	8 Articles In Blackboard	The role of sales in customer development	Read Chapter 8 In-Class Mini-Case by Teams Application questions discussed by teams No Homework is due
8 March 1	9 Articles In Blackboard	Developing the new firm's marketing & sales capabilities	Read Chapter 9 In-Class Mini-Case by Teams Application questions discussed by teams Take-home final is due before class starts – turn- in to Blackboard

APPENDIX A

Biographical Sketch Ken Merbler

Ken Merbler has been in the seminar and consulting business for over 35 years and has worked for 4 consulting companies (Philip Crosby Associates, Proudfoot Consulting and retired from Deloitte Consulting after 20 years). Currently Ken is the founding partner at the Brikell Consulting Group, a sales consulting firm.

In addition to Ken's consulting business he is an adjunct professor at Rollins College teaching sales management classes in the graduate school and basic selling skills to undergraduates.

Ken has lived in the UK, Belgium, France, Singapore, Japan and Canada and has conducted executive seminars and consulted in another 25 countries in Europe, Asia and Africa during his career.

Some of his global clients have included the following:

Hewlett Packard	Honda
Nortel Networks	Sony
Rogers Communications	Government of Singapore
ICI	Japanese Management Assoc.
Maersk	IBM
ICL	Chrysler Motors/ Currently Fiat Chrysler or Chrysler
KLM	Agilent

Ken is a member of the Baylor University Advisory Board for Baylor's Center for Professional Selling. Prior to launching his own consulting business, he served as Director of Joint Sales (Deloitte & HP) for Deloitte Consulting US. He also worked on an internal team to develop and deliver sales training to firm partners and senior managers.

Ken earned his BBA from the University of Texas at Arlington and his MBA from the Crummer Business School at Rollins College. He is a frequent lecturer inside Deloitte and at a number of colleges and universities such as Notre Dame, Baylor University and Florida State.

Ken Merbler was honorably discharged from the United States Marine Corps and is a Vietnam veteran. Currently Ken lives in Winter Park, Florida and Burlington, Ontario, Canada with his wife Linda.

APPENDIX B

General Instructions for “Individual Case” Write-ups – Executive Summary Style MKT 611 – Sales & Marketing Entrepreneurs

Purpose: The purpose of considering the cases is to have the opportunity to survey and discuss a variety of problems and issues in sales and relationship management.

Template for Analysis

Your analysis should be in an “executive summary” format. Use bullet points wherever you think that format adds value. *It should be no longer than four pages, typed, and single-spaced on bulleted areas and 1.5-spaced on paragraph areas.* We will be discussing the cases in class the day they are due, so you can add much via your discussion in terms of additional ideas that might augment your paper. Follow these general headings in the paper:

- (1) Brief summary of current situation (do not rehash the entire case) – provide your “take”
- (2) Identification of key problem(s) or issue(s) that need addressing, with supporting evidence as to why you believe these deserve attention
- (3) Options you suggest for addressing the problem(s)/issue(s) – provide a top-line analysis of each including pros/cons or advantages/disadvantages
- (4) Your recommended action plan, including implementation

How I will grade

I will be looking for nicely developed ideas, logic and completeness of thought, how the paper ties together to make sense, and of course good professional formatting and writing style.

I believe that most case studies have several right solutions, so I am looking for your validation of your proposed solution – needs to make sense and is supported.

Especially, make your best effort to tie the paper to specific topics from the readings and class discussion. As mentioned earlier, you should plan to use the class discussion about the cases to augment your ideas provided within the paper.



**Crummer Graduate School of Business
Rollins College**

**Course Syllabus
Spring 2018, Module 2**

**Customer Relationship Management
MKT 618
2 Credit Hours
Faculty Name: Ken Merbler
Classroom: Crummer Hall, Room 207**

**Office Location: None
Email Address: kmerbler@rollins.edu
Phone (Mobile): 650 269-7488**

Course Description and Objectives

This course focuses on the core business strategy and process of building, developing, and maintaining long term effective customer relationships. The customer relationship management (CRM) system provides customer contact to order fulfillment. CRM helps maintain, nurture and enhance a company's relationship with its customers. This course provides the latest in-depth understanding of CRM and how it is evolving into a critical business tool to assure "Customer Engagement" and a close interaction between the buyer and the seller. This course will be a blend of in-class discussions, team assignments, experienced (CRM) guest speakers and case studies.

Our objective is to provide students with a level of understanding of how CRM can be successfully used to achieve business goals and sustain relationships with profitable customers. Emphasis is placed on the insights and advice from successful CRM users. In addition, we will explore the rapidly changing use of CRM and the compelling and exciting new way to converse with all customers.

Partial list of important topics covered:

- Customer relationship management (CRM)
- Three main forms of CRM: strategic, operational and analytical
- Benefits that come from managing customers as a portfolio
- Understanding your value proposition to the customer
- Building customer engagement
- Impact to sales, marketing, customer support and the customer
- Exploring customer-related data for the execution of your CRM strategy
- Implementing CRM and all the considerations that need to be made – Strategies, Customer Experience Mapping, Compliance, etc.

Knowledge and Skills Students Expected to Master:

- Students will have a chance to review the successful use of CRM systems
- Students will learn that the CRM process is used for managing all interactions with customers
- Students will understand the essentials of CRM and the financial return on this investment
- Students will examine the difference between the 3 types of CRM – Strategic, Operational & Analytical
- Students will have the knowledge of how to use social CRM technologies
- Students will have the chance to develop their own CRM strategy for a company

Course Resources

“Customer Relationship Management – Concepts and Technologies”, 3rd Edition

By Francis Buttle and Stan Maklan

Articles and Case Studies: Provided in Blackboard

Adjunct Professor

A brief biographical sketch of Ken Merbler is attached (Appendix A).

Case Write-up Requirements

General Instructions for “Mini-Case” and “Individual Case” Write-ups – Executive Summary Style (Appendix B)

Teaching Approach

This course is conducted in a “seminar” style, meaning that classes will normally include a combination of instructor-led discussions and in-class activities and exercises. Because the assigned textbook may be viewed as an important “springboard” for further discussion, classroom presentations will not be a mere rehash of the text material but will instead use it as a platform on which to build a deeper dialogue. This type of course requires that each week, every student come to class fully prepared to discuss the material that is relevant for that class period. In order to succeed in this course format, each student must be willing to contribute his/her ideas to the class discussion. I may call on you in class for feedback, so it is very important that you be prepared for the day’s assignments.

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Application Questions

In-class exercises using questions that directly apply to the chapters being discussed. **Some will be done individually and some will be by teams.**

In-Class Mini-Cases

We will explore some topics through CRM mini-cases. These mini-cases are an *in-class team activity*. Each will come with its own instructions for approaching the issues. The specific deliverable will be explained at the time of the assignment. I may ask you to do a short extemporaneous presentation related to the mini-case. In order to be able to work on these you *must be up-to-date with the assigned readings on the day each is to be accomplished*.

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You will prepare two larger individual cases in executive summary format throughout the semester to allow for consideration of a number of important topical issues in CRM. Basic guidelines for preparing these appear in Blackboard – we will discuss the effective case process in more detail. It is of particular importance to note that the **cases are to be prepared individually by each student**. *Students are not to collaborate or work together in preparing these case studies.* These are due via Blackboard at the beginning of the class period.

Take-Home Final Exam

We will have a take-home final exam. This will be application oriented to allow you to demonstrate how well you can integrate what you have learned about CRM and apply it to customer relationship situations. It is of particular importance to note that the take-home **final is to be prepared individually by each student**. *Students are not to collaborate or work together in preparing the take-home final.* It is due via Blackboard at the beginning of the class period on the due date.

Grading

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25%: Individual Case Studies (3 Cases)

10% Application Questions (1 set of questions per class)

15%: Class Attendance, Participation & Contribution

100%

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**CLASS SCHEDULE
FORMAT: On-Campus**

WEEK OF	CHAPTERS	TOPICS AND OTHER READINGS	HOMEWORK AND OTHER ASSIGNMENTS
1 March 8	1 & 2 Articles In Blackboard	(1) Introduction to CRM (2) Understanding Relationships	Read Chapters 1 & 2 In-Class Mini-Case by Teams Application questions discussed by teams No Homework is due
2 March 15	3 & 4 Articles In Blackboard	(3) Mgt. customer lifecycle- customer acquisition (4) Mgt. the customer lifecycle – customer retention	Read Chapter 3 & 4 In-Class Mini-Case by Teams Application questions discussed by teams No Homework is due
3 March 22	5 & 6 Articles In Blackboard	(5) Customer portfolio management (6) How to deliver customer- experienced value	Read Chapter 5 & 6 - Do Individual case (1) posted in Blackboard – Turn-in to Blackboard before class starts In-Class Mini-Case by Teams Application questions discussed by teams
4 March 29	Field Project Week	No Class	No Class
5 April 5	7 & 8 Articles In Blackboard	(7) Managing customer experience (8) Sales force automation	Read Chapter 7 & 8 In-Class Mini-Case by Teams Applications questions discussed by teams No Homework is due
6 April 12	9 & 10 Articles In Blackboard	(9) Marketing automation (10) Service automation	Read Chapters 9 & 10- Do Individual case (3) posted in Blackboard – Turn-in to Blackboard before before class starts Application questions discussed by teams Take-home final is posted in Blackboard
7 April 19	11 & 12 Articles In Blackboard	(11) Developing & mgt. customer- related databases (12) Using customer related data	Read Chapter 11 & 12 In-Class Mini-Case by Teams Application questions discussed by teams No Homework is due
8 April 26	13, 14 & 15 Articles In Blackboard	(13) Planning to succeed (14) Implementing CRM (15) The future	Read Chapter 13, 14 & 15 In-Class Mini-Case by Teams Application questions discussed by teams Take-home final is due before class starts – turn- in to Blackboard

APPENDIX A

Biographical Sketch
Ken Merbler

Ken Merbler has been in the seminar and consulting business for over 35 years and has worked for 4 consulting companies (Philip Crosby Associates, Proudfoot Consulting and retired from Deloitte Consulting after 20 years). Currently Ken is the founding partner at the Brikell Consulting Group, a sales consulting firm.

In addition to Ken's consulting business he is an adjunct professor at Rollins College teaching sales management classes in the graduate school and basic selling skills to undergraduates.

Ken has lived in the UK, Belgium, France, Singapore, Japan and Canada and has conducted executive seminars and consulted in another 25 countries in Europe, Asia and Africa during his career.

Some of his global clients have included the following:

Hewlett Packard	Honda
Nortel Networks	Sony
Rogers Communications	Government of Singapore
ICI	Japanese Management Assoc.
Maersk	IBM
ICL	Chrysler Motors/ Currently Fiat Chrysler or Chrysler
KLM	Agilent

Ken is a member of the Baylor University Advisory Board for Baylor's Center for Professional Selling. Prior to launching his own consulting business, he served as Director of Joint Sales (Deloitte & HP) for Deloitte Consulting US. He also worked on an internal team to develop and deliver sales training to firm partners and senior managers.

Ken earned his BBA from the University of Texas at Arlington and his MBA from the Crummer Business School at Rollins College. He is a frequent lecturer inside Deloitte and at a number of colleges and universities such as Notre Dame, Baylor University and Florida State.

Ken Merbler was honorably discharged from the United States Marine Corps and is a Vietnam veteran. Currently Ken lives in Winter Park, Florida and Burlington, Ontario, Canada with his wife Linda.

APPENDIX B

General Instructions for “Individual Case” Write-ups – Executive Summary Style MKT 618 – Customer Relationship Management

Purpose: The purpose of considering the cases is to have the opportunity to survey and discuss a variety of problems and issues in sales and relationship management.

Template for Analysis

Your analysis should be in an “executive summary” format. Use bullet points wherever you think that format adds value. *It should be no longer than four pages, typed, and single-spaced on bulleted areas and 1.5-spaced on paragraph areas.* We will be discussing the cases in class the day they are due, so you can add much via your discussion in terms of additional ideas that might augment your paper. Follow these general headings in the paper:

- (1) Brief summary of current situation (do not rehash the entire case) – provide your “take”
- (2) Identification of key problem(s) or issue(s) that need addressing, with supporting evidence as to why you believe these deserve attention
- (3) Options you suggest for addressing the problem(s)/issue(s) – provide a top-line analysis of each including pros/cons or advantages/disadvantages
- (4) Your recommended action plan, including implementation

How I will grade

I will be looking for nicely developed ideas, logic and completeness of thought, how the paper ties together to make sense, and of course good professional formatting and writing style.

I believe that most case studies have several right solutions, so I am looking for your validation of your proposed solution – needs to make sense and is supported.

Especially, make your best effort to tie the paper to specific topics from the readings and class discussion. As mentioned earlier, you should plan to use the class discussion about the cases to augment your ideas provided within the paper.



Course Syllabus - Spring Module II - 2018

CAP 604 ~ Advanced Strategy Applications (“ICE CAP”) ~ EAMBA 29/30

Room 318 ~ 2 Credit Hours

**Meeting Times: Section 1 – 8:30 - 11:30 a.m. Monday; Section 2 – 1:00 - 4:00 p.m. Monday;
Section 3 – 8:30 – 11:30 a.m. Tuesday**

Professor Greg W. Marshall

Office: Crummer 302

Email: gmarshall@rollins.edu

Phone: 407-691-1150

COURSE DESCRIPTION

This course culminates the Integrated Capstone Experience (ICE) course series for the EAMBA students. It is designed to serve three broad purposes: (1) provide an opportunity for demonstration and expansion of student learning drawing on their specific Immersion projects; (2) offer a forum for broader, integrative end-of-program application of capabilities gleaned across their Crummer experiences; and (3) focus students on the criticality of strategy execution as a *sine qua non* of business success. Immersion teams will be deconstructed for this course into different configurations of students in order to fully facilitate cross-pollination of learning based on the diverse student experiences during the immersion phase of ICE. Advanced business strategy topics will be central within the learning mix at a broad level with an overarching goal of each student gaining a greater command of the concept of an overall business model and how organizational strategy – especially the execution component – drives the business. The course is almost totally experiential, with applications of various business strategy elements providing the opportunity for students to better master the “big picture” of a business and especially to gain a comfort level around the art and science of strategy of great strategy execution.

COURSE OBJECTIVES

CAP 604 will:

- Facilitate a shared learning experience derived from student experiences across the ICE Immersion team projects and leadership experiences.
- Ensure that graduating EAMBA students understand at a deep level what an overall business model is and exhibit a high level of overall business acumen
- Introduce advanced topics in organizational strategy execution through a series of applied, cross-functional, and experiential exercises and demonstrations
- Acculturate a “strategic mindset” into students – clearly a key success factor in successful leaders
- Systematically connect prior student learning at Crummer from across the core functional areas of business with the organizational level knowledge and skill demanded for overall strategic success of a firm
- Connect the dots of a firm’s business model and organizational strategies to a broader set

of issues in ethics, social responsibility, and sustainability.

- Allow students to take advantage of their own specializations derived from concentrations to serve as internal specialist consultants within the course and their teams, providing value-added for students with other specialties as well as enhancing the course experience as a whole

COURSE PREREQUISITES

Final semester standing and successful completion of all Crummer core courses and CAP 601-603.

COURSE RESOURCES

We will rely on two outstanding books to provide guideposts and structure for our learning experiences and related experiential exercises. These are not traditional textbooks. Each is a contemporary treatment of key issues and challenges in strategy execution today, replete with examples from some of the best strategists in business.

- *Strategy That Works: How Winning Companies Close the Strategy-to-Execution Gap*, by Paul Leinwand and Cesare R. Mainardi. Boston: Harvard Business Review Press, 2016.
- *Your Strategy Needs a Strategy: How to Choose and Execute the Right Approach*, by Martin Reeves, Knut Haanaes, and Janmejaya Sinha. Boston: Harvard Business Review Press, 2015.

These books are *required reading* by each student. And they are essential for accomplishing all of the deliverables built into this course. They are available on Amazon and elsewhere at very reasonable prices.

GRADING

A total of 600 points will be available for the student. These may be earned as follows:

Experiential Activities (team with individual components) (6@50 points each)	300
Rumination Paper (individual)	100
Team Strategic Renewal Blueprint and Presentation	150
Participation and individual contribution to discussion	<u>50</u>
TOTAL	600

Grade Computation

Grades are reported as follows:

A	93-100%
A-	90-92.99%
B+	87-89.99%
B	83-86.99%
B-	80-82.99%
C+	77-79.99%
C	73-76.99%
F	Below 70%

Advice on MBA Attitude toward Grades

It is pointless and ultimately self-defeating to fixate on grades in an MBA program. Graduate education is different from undergraduate education in many ways. Students who carry a grade fixation overboard in graduate school often risk damaging their relationship with their professors, with the school, and with their peers. Your job here at Crummer is to do your best and to focus on the learning opportunity your course of study affords you to become a more effective leader and manager.

Peer Evaluations

It is expected that every member of a team will participate fully and equally in the research, analysis, preparation, and delivery of team assignments. On team elements there will be an overall team score for each project. Then, at the end of the course you will complete a peer/self-evaluation of the team aspect of the course. I pay a lot of attention to these in assigning final grades for the course. Based on the results of this evaluation, as well as my own assessment, team members' course grades will be adjusted if necessary. For example, if all members of the team participate fully and successfully in the team elements, then each grade will not be adjusted. However, if one or more particular team members do not participate fully and successfully in the team projects, then his/her grade will be adjusted accordingly.

Late Assignment Policy

Overall, please exhibit good planning and time management skills throughout the semester. To be perfectly clear: I am not receptive to receiving assignments late.

ASSIGNMENTS

The following assignments comprise the deliverables for the course.

Experiential Activities (Team with Individual Components)

This course is largely application in nature. Throughout the term you will engage in six uniquely designed experiential activities that highlight various learning elements related to strategy execution. Each of these connects in different ways with our readings and discussions, your experiences in the Immersion portion of ICE, and the broader learning from throughout your Crummer experience. Each will have an individual component that plays into the broader team component of the activity. Typically you will be assigned something in advance and then during our class time your team will meet with my facilitation to create a deliverable that ultimately is shared with the overall class for discussion and comparison.

Rumination Paper (Individual)

Rumination means *deep or considered thought about something*. This assignment is designed to get you to push the limits of your capabilities as a Crummer MBA almost-graduate to think like a strategic leader and apply your knowledge and skill onto a particularly challenging scenario. This is like a "take-home midterm" but it's certainly not a traditional exam. I will reveal the scenario and coach you on this assignment during Week 4 and then during Week 5 we will not meet as a group and everyone will work on their individual Rumination Papers.

Strategic Renewal Blueprint and Presentation (Team)

As a final deliverable to give the teams an opportunity to show off their business acumen as Crummer branded MBAs, this assignment challenges you to propose and pitch a strategic renewal blueprint to senior management, applying the elements of strategy execution in a systematic way. Specific components of the blueprint are derived from our readings and discussions during the term and a basic template is posted on Blackboard along with the parameters for preparing the paper and presentation.

CLASS ATTENDANCE AND PARTICIPATION

Your individual contribution to the classroom discussion based on your own knowledge and your experiences is a critical part of the success of the course for everyone. Likewise, your participation in in-class breakout exercises is central to the course's value. Note that 50 points depend on your performance in this facet of the course. This is often enough to make a difference in final course grades. I expect relevant, informed, interesting, and insightful comments from individuals in the class. This includes during full class discussion as well as during team breakout sessions. In all situations, be absolutely clear that quality of contribution rather than merely quantity of "talk time" is a key to your success. Be respectful of other students and avoid exhibiting dominating, one-way, and "shot from the hip" approaches to class discussion.

It is your responsibility to attend class. Obviously, if you are not in class you cannot be recognized for your contribution toward the weekly discussion or break outs. In extreme cases where you must miss, if you inform me in advance of an upcoming absence we can attempt to work out a reasonable alternative approach of some type. **However, under no circumstances will I entertain doing this when I learn of an absence *after the fact*.**

CRUMMER ACADEMIC INTEGRITY POLICY

As stated in the Crummer School of Business *Academic Integrity Policy*, faculty, students and staff are expected to uphold the highest level of ethical standards. This course requires that all students meet expectations of scholastic honesty, particularly when completing individual assignments. Collusion or cheating in any form will not be tolerated. Failure to abide by these standards will result in full punishment as prescribed by the policy.

SPECIAL ACCOMMODATIONS

Rollins College is committed to equal access and does not discriminate unlawfully against persons with disabilities in its policies, procedures, programs or employment processes. The College recognizes its obligations under the Rehabilitation Act of 1973 and the Americans with Disabilities Act of 1990 to provide an environment that does not discriminate against persons with disabilities.

If you are a person with a disability on this campus and anticipate needing any type of academic accommodations in order to participate in your classes, please make timely arrangements by disclosing this disability in writing to the Rollins Accessibility Services Office at (box 2613) - Thomas P. Johnson Student Resource Center, 1000 Holt Ave., Winter Park, FL, 32789. Appointments can be scheduled by calling 407-646-2354 or email access@rollins.edu.

TITLE IX STATEMENT

Rollins College is committed to making its campus a safe place for students. If you tell any of your faculty about sexual misconduct involving members of the campus community, your professors are required to report this information to the Title IX Coordinator. Your faculty member can help connect you with the coordinator (TitleIX@rollins.edu or 407-691-1773). The coordinator will provide you with information, resources and support. If you would prefer to speak to someone on campus confidentially, please call the Wellness Center at 407-628-6340. They are not required to report any information you share with the Office of Title IX.

Sexual misconduct includes sexual harassment, stalking, intimate partner violence (such as dating or domestic abuse), sexual assault, and any discrimination based on your sex, gender, gender identity, gender expression or sexual orientation that creates a hostile environment. For information, visit www.rollins.edu/titleix.

AGENDA

Class

<u>Session</u>	<u>Date</u>	<u>Activities</u>
1	3/5-6	<p><i>Read in advance:</i></p> <ul style="list-style-type: none"> • Leinwand Ch1 (Overcoming the Strategy-to-Execution Gap) and Appendix A (A History of Strategy) • Reeves Ch1 (Introduction) <p><i>Activities:</i></p> <ul style="list-style-type: none"> • Set up the course and discuss key assignments • Engage in discussion of student experiences and outcomes from CAP 602-603 (Immersion), and goals for CAP 604 • Experiential Activity 1
2	3/12-13	<p><i>Read in advance:</i></p> <ul style="list-style-type: none"> • Leinwand Ch2 (Commit to an Identity) • Reaves Ch2 (Classical: Be Big) <p><i>Activities:</i></p> <ul style="list-style-type: none"> • Experiential Activity 2
3	3/19-20	<p><i>Read in Advance:</i></p> <ul style="list-style-type: none"> • Leinwand Ch3 (Translate the Strategic into the Everyday) • Reaves Ch3 (Adaptive: Be Fast) <p><i>Activities:</i></p> <ul style="list-style-type: none"> • Experiential Activity 3
4	3/26-27	<p><i>Read in Advance:</i></p> <ul style="list-style-type: none"> • Leinwand Ch4 (Put Your Cultures to Work) • Reaves Ch4 (Visionary: Be First) <p><i>Activities:</i></p> <ul style="list-style-type: none"> • Experiential Activity 4 • Reveal and explain individual Rumination Papers assignment
5	4/2-3	<p><i>Read in Advance:</i></p> <ul style="list-style-type: none"> • Leinwand Ch5 (Cut Costs to Grow Stronger) • Reaves: Ch5 (Shaping: Be the Orchestrator) <p><i>Activities:</i></p> <ul style="list-style-type: none"> • Remote week - work on individual Rumination Papers – due into Blackboard before your class begins next week
6	4/9-10	<p><i>Read in Advance:</i></p> <ul style="list-style-type: none"> • Leinwand Ch6 (Shape Your Future) • Reaves Ch6 (Renewal: Be Viable) <p><i>Activities:</i></p> <ul style="list-style-type: none"> • Experiential Activity 5
7	4/16-17	<p><i>Read in Advance:</i></p> <ul style="list-style-type: none"> • Leinwand Ch7 (Bold and Unafraid) • Reaves Ch7 (Ambidexterity: Be Polychromatic)

Activities:

- Experiential Activity 6

8 4/23-24 *Read in Advance:*

- Reaves Ch8 (Lessons for Leaders: Be the Animator)
- Reaves Epilogue (Personally Mastering the Strategy Palette)

Activities:

- Team Strategic Renewal Blueprint due
- Final Team Presentations of Strategic Renewal Blueprint



Crummer Graduate School of Business
Rollins College

Course Syllabus
Term: Spring 2018 Terms I & II

Integrative Capstone Experience: CAP 611 & CAP 612

4 Credit Hours (16 weeks)

Term I: Wednesday, 6:30pm to 9:30pm, Room 222

Term II: Monday, 6:30pm to 9:30pm, Room 107

Faculty Guides:

Greg Turkanik & Peter McAlindon, Ph.D.

Office Location: Crummer 201

Email Address: gturkanik@rollins.edu

Phone: 407-691-1343

Office Location: Crummer 317A

Email Address: pmcalindon@rollins.edu

Cell Phone: 321-277-4272

COURSE DESCRIPTION AND OBJECTIVES

This Integrative Capstone Experience (CAP) examines the processes of working with and scaling an organization through the analysis and improved implementation of its business model. Such processes cover a wide variety of activities, philosophies and skills, and tools all centered on recognizing and seizing opportunities and creating and growing new opportunities for the organization.

This 16 week course, Terms I & II, is performed in three sections: ICE Prep, ICE Experience, and ICE Cap (refer to Figure 1). ICE Prep is two weeks in duration and focuses primarily on leadership development, team building and performance, and critical, reflective, and innovative thinking skill development. The ICE Experience is eleven weeks in duration and focuses primarily on areas of strategy and is where we will examine companies in depth in terms of operations, marketing and sales, personnel, financial performance, and leadership development. Our goal is to inspect and improve the organization's business model through the use of case studies, direct involvement, audit, simulation, spreadsheet analyses, financial modeling, and both off-line and on-line tools. In the last three weeks, ICE Cap, the focus will be on critical, reflective, and innovation thinking. We will reflect on the previous thirteen weeks, share thoughts, process, and tactics by the other teams and their respective organizations, and will examine how each organization's business model evolved and improved.

Deliverables of the ICE Program will be a comprehensive business model presentation at the conclusion of Term II to company representatives and other personnel from various organizations.



Figure 1: Overview of Integrative Capstone Experience (CAP)

In addition to course discussions, students will work as a team to fully understand business model creation, evaluation, and/or updating a current business model and business plan for a specific organization selected by the faculty and the team.

Because this course recognizes the importance of “real world” business development, consulting and entrepreneurship, we will work with local business leaders, consultants, and entrepreneurs to serve as both mentors and coaches.

Over the course of the semester, students will learn to:

- Articulate and better understand goals regarding consulting and strategy development and implementation and where such goals fit within the consulting and intra/entrepreneurship continuum.
- Understand the importance of the dynamic nature of a business model (vs. business plan), and the key elements in making an effort successful and a business model work, including how to:
 - + Recognize an opportunity and create a value proposition around a winning idea
 - + Articulate a compelling business concept and value proposition
 - + Analyze and identify viable markets and marketing opportunities
 - + Identify sources and uses of financing
 - + Achieve excellence in product development, marketing, finance,

- management, sales, and operations without completely exhausting your limited budget
- + Develop marketing, operations and organizational plans focused on execution

- Deliver effective presentations
- Build a team of employees, partners, and investors
- Understand the stages of consulting and launching an entrepreneurial venture and how to manage growth from launch to a more advanced stage of business
- Identify and prepare for exit strategies.

COURSE PREREQUISITES

None

REQUIRED COURSE RESOURCES

- Consulting resources — Flawless Consulting: A Guide to Getting Your Expertise Used – Third Edition. Peter Block. Jossey-Bass/Pfeiffer, 2011. ISBN 0-4706-2074-9
- The Lean Startup, Eric Ries, Crown Business, 2011
- Value Proposition Design: How to Create Products and Services Customers Want, Alexander Osterwalder, Yves Pigneur, Gregory Bernarda, and Alan Smith, Wiley, 2015.
- Why the Lean Startup Changes Everything, Steve Blank, Harvard Business School, 2013 - article (Link on Blackboard to download free. You will also see this document in our assignment list on the Harvard Business School website as an optional download.)
- Business Model Canvas and Value Proposition Canvas - PDF file (can be found on our class Blackboard site)

Other suggested Resources:

Books:

- An Insider's Guide to Building a Successful Consulting Practice, Bruce Catcher
- The Trusted Advisor, David H. Maister, Charles H. Green, Robert M. Galford, 2001 (ISBN 0743212347)
- Built to Sell: Creating a Business That Can Thrive Without You, John Warrillow, 2012 (ISBN-10: 1591845823)
- Business Model Generation: A Handbook for Visionaries, Game Changers, and Challengers, Alexander Osterwalder and Yves Pigneur, Wiley Publishing, 2010
- Do More Faster: TechStars lessons to accelerate your startup, David Cohen, Brad Feld, 2011 (ISBN 978-0-470-92983-4)
- The Art of the Start 2.0, Guy Kawasaki, 2015 (ISBN 1-59184-784-2)

Articles:

- Note on Business Analysis for the Entrepreneur, Richard G. Hamermesh, Paul W. Marshall, Taz Pirmohamed (2002), Harvard Business School 9-802-048
- Designing Organizations for Dynamic Capabilities, Teppo Felin; Thomas C. Powell, (2016), California Management Review
- The Hard Truth About Business Model Innovation, Clayton M. Christensen; Thomas Bartman; Derek van Bever, (2016), MIT Sloan Management Review
- Hypothesis-Driven Entrepreneurship: The Lean Startup, Thomas Eisenmann, Eric Ries, Sarah Dillard, (2013), Harvard Business School 9-812-095. You will see this document in our assignment list on the Harvard Business School website as an optional download.
- Personal Selling and Sales Management, Thomas Steenburgh (2006), Harvard Business School 9-507-039

Grading:

- Evaluation will be based on both team and individual performance.
- All team evaluations will include a confidential peer review by members of each team (see Appendix A).
- Assignments are expected to be submitted and/or presented on the assigned due date and time. Late submissions will result in a reduced grade until submitted, unless otherwise excused.
- There is no "D" grade. Any grade lower than a 70 will be considered an "F".

Assignments	20%
Final Business Model/Plan Presentation & Paper	40%
Team Interim Project Presentations	20%
Participation and Constructive confrontation	20%
Total	100%

GRADE SCALE		
A	93 to 100	indicates consistently excellent work, executed to a professional standard. In other words, someone would pay you for it.
A-	90 to 92.9	indicates consistently excellent work, superior to the expectations of a graduate student.
B+	87 to 89.9	indicates work of the quality normally expected of a graduate student

B	83 to 86.9	indicates work of the quality normally expected of a graduate student
B-	80 to 82.9	indicates work of the quality normally expected of a graduate student
C+	77 to 79.9	indicates work that is below the quality expected in graduate study
C	73 to 76.9	indicates work that is below the quality expected in graduate study
C -	70 to 72.9	indicates work that is below the quality expected in graduate study
F	below 70	indicates work that is unacceptable in graduate level of study

I: Incomplete indicates that the student and instructor have agreed that outstanding work will be completed and the grade changed to A, B, C or F by the mid-term point of the following term.

TEAM ROLES AND RESPONSIBILITIES

Your team has two functions in this class:

1. Project and class discussion. In class the professor will ask each team to prepare and present responses or solutions to the assignments. Performance in these discussions will be evaluated as part of the student's assignment and participation grades.
2. Develop and present an evaluation of a business model and/or strategy for a startup or later stage organization. Each of the companies we will examine have the potential for high growth to at least \$5 million in revenue (for startups), or to double the revenue (for later stage), in no more than 5 years.

INDIVIDUAL WORK

Each student will prepare a one-page brief for certain, specific issues that arise over the course of the ICE Program. In preparing your assignment brief, identify **one** problem in the assignment and prepare a comprehensive solution to that singular problem. For more on what is expected specifically from your write-up please refer to the "Assignment Rubric" on Page 15.

Interim Team Presentation Feedback

After the team delivers the interim presentations, they will receive feedback from the professor, their peers, and their outside mentor(s). As a member of the feedback team,

you will prepare a one page written document that constructively provides guidance and suggest areas for development and improvement. Your preparation and return of these three forms is part of your class participation grade. An in-class discussion of the projects and feedback will take place the day of the interim presentations.

General Policies:

- Students are expected to regularly participate in discussions and to engage mentors in insightful Q & A.
- Students are expected to be respectful of their fellow classmates, the instructor and mentors, by coming to class prepared to fully participate with full attention for all assignments, presentations and class discussions.
- There is no provision for make-up work and will be considered on a case by case basis.

Your Rights and Responsibilities & Code of Conduct

CRUMMER ACADEMIC INTEGRITY POLICY

- Students must follow the letter and spirit of the code of academic conduct of the Crummer Graduate School of Business. If you have any questions, please see: <http://www.rollins.edu/business/student-services/docs/masters-student-handbook-2016-17.pdf> As stated in the *Crummer School of Business Academic Integrity Policy*, faculty, students and staff are expected to uphold the highest level of ethical standards. This course requires that all students meet expectations of scholastic honesty, particularly while taking exams. During in-class exams, you may not share any information, materials or electronic files with others. Collusion or cheating in any form will not be tolerated. Failure to abide by these standards will result in full punishment as prescribed by the *Policy*.

STUDENTS WITH DISABILITIES

<https://rpublic.rollins.edu/sites/ASCPS/Shared%20Documents/Syllabi%20Statements/syllabi-statement-disability-services.pdf>

Rollins College is committed to equal access and does not discriminate unlawfully against persons with disabilities in its policies, procedures, programs or employment processes. The College recognizes its obligations under the Rehabilitation Act of 1973 and the Americans with Disabilities Act of 1990 to provide an environment that does not discriminate against persons with disabilities.

If you are a person with a disability on this campus and anticipate needing any type of academic accommodations in order to participate in your classes, please make timely

arrangements by disclosing this disability in writing to the Disability Services Office at (Box 2764), 1000 Holt Ave., Winter Park, FL, 32789 or call 407-646-2345 for an appointment.

CREDIT HOUR STATEMENT

<https://rpublic.rollins.edu/sites/ASCPS/Shared%20Documents/Syllabi%20Statements/syllabi-statement-credit-hours.pdf>

This course is a two, two-credit-hour course that meets three hours per week. The value of three credit hours results from work expected of enrolled students both inside and outside the classroom. Rollins faculty require that students average at least three hours of outside work for every hour of scheduled class time. In this course, the additional outside-of-class expectations includes reading of current articles, collecting data for assignments, and conducting and completing all major assignments. This is all in addition to reading the assigned book chapters and practicing course taught techniques.

TITLE IX

Rollins does not discriminate on the basis of sex in its educational programs and activities or in the context of employment. The Title IX office leads Rollins' efforts to prevent and respond to sex and gender based discrimination.

Title IX protects female and male students, employees and visitors, including individuals that identify as gay, lesbian, bisexual and/or transgender.

<https://rpublic.rollins.edu/sites/ASCPS/Shared%20Documents/Syllabi%20Statements/syllabi-statement-title-ix.pdf>

About your professors: Greg Turkanik & Dr. Pete McAlindon

Greg Turkanik

Greg Turkanik is the Executive in Residence for International Business at the Rollins College Crummer Graduate School of Business, where he brings to the classroom over 14 years of professional experience in consulting, sales, marketing and business development. Greg's career has focused on international business as he was responsible for launching foreign operations and business development for several companies in the IT industry in Central and Eastern Europe. He has also been involved in teaching and corporate training for executives on international expansion, cross-cultural communication and strategic thinking.

Greg is also a co-founder of two tech companies. Talfit is helping companies to assess person-organization cultural and values fit during the recruitment process and to discover team roles in existing teams. Kidstal helps parents discover the natural aptitudes of their children and provides development activities for them. Expertise International Business Cross-Cultural Management Sales and Marketing Strategic Management Entrepreneurship (Start-up ventures) Degrees Held MBA, Rollins College MA, ChAT, Poland Contact Office Phone: 407-691-1343 E-mail: gturkanik@rollins.edu

Office Location: Bush Executive Center, Rm. 201
Twitter: <https://twitter.com/gregturkanik>

Pete McAlindon, Ph.D.

Dr. Peter McAlindon is the Entrepreneur in Residence at the Rollins College Crummer Graduate School of Business. He is also chief executive officer of Blue Orb Inc., a technology company that develops computer technology for persons with disabilities.

Blue Orb Inc. created and markets the orbiTouch Keyless Keyboard. The orbiTouch is a patented computer keyboard and mouse that requires no finger or wrist motion to operate. It was developed for people who do not have the finger or hand dexterity to use a regular keyboard or mouse. It is used by people who have arm or hand prostheses or who have limited hand and finger use due to injury, arthritis, carpal tunnel syndrome, stroke, cerebral palsy and many other physical conditions. It is also being successfully used by people who are visually impaired, blind, have autism, or have traumatic brain injury. The orbiTouch has received numerous positive industry reviews, the prestigious daVinci award for design, and the top honor for accessible technology at the Consumer Electronics Show.

Prior to forming Blue Orb Inc. Dr. McAlindon was chief executive officer for inTouch Computing, a web design company. Dr. McAlindon directed the organization's vision, financial reporting and control functions, as well as its business development and strategy formulation, product development, and all operational and performance management functions.

A native of Michigan, Dr. McAlindon graduated with honors from the University of Michigan, was nominated to the National Dean's List, and is a member of several professional societies and associations. In addition to teaching at Rollins, he is also an adjunct professor at the University of Central Florida where he has taught courses in statistics, research methods, computer applications, quantitative methods, and product design and development.

Dr. McAlindon is a co-founder of venVelo, Florida's newest business accelerator and seed capital fund.

Expertise: Entrepreneurship (Start-up Ventures), Angel Capital, Human Computer Interaction, Product Design and Development, Research Methods and Statistics.

Tentative ICE Program Schedule

Note: This schedule is subject to change. If you miss class, check with a member of your team or the class website for the details on the information missed.

Date	ICE Prep (2 weeks) -- Room 222 You can't climb a mountain without the proper tools and guide(s)!	Guides
Week 1	ICE Program Introduction, Discussion of Leadership Critical & Reflective Thinking Consulting Skill Development/ Consulting Process Overview LinkedIn profile development; career positioning Tool review: https://www.extension.harvard.edu/professional-development/blog/6-tools-every-business-consultant-should-know	Turkanik & McAlindon
Week 2	Innovative & Design Thinking Team Performance: How to optimize and leverage each other's skills. Project Management/ Strategy Audit Ethics Assignment: Dynamic Capabilities Tool review: Business model canvas. CATME overview Performance website.	Turkanik & McAlindon

Date	ICE Immersion/Experience (11 weeks) -- Rooms 222 & 107 You are now ready to ascend. Onward and upward!	Guide
Week 3	On-site visit to company Perform Audit on Company Strategy and Business Model <u>Assignment</u> : Value Proposition	Turkanik & McAlindon
Week 4	Definition of Project Goals Audit and Simulation - Overview, process and set-up <u>Assignment</u> : Business Model Innovation	Turkanik & McAlindon
Week 5	Inspection & Improvement — Consulting & Entrepreneurship Modeling <i>Lean Startup Overview and Business Model Canvas</i> Application of Lean Startup to Semester Project	Turkanik & McAlindon
Week 6	<i>Guest Speaker: e.g., Patent Attorney, Terry Sanks</i> Inspection findings - team interim presentation Where to Start & How to End Grades due: Pass/Fail	Turkanik & McAlindon
Week 7	Market Opportunity/Competitive Landscape Ideas & Opportunities <u>Assignment</u> : Business Model Product/Market Fit	Turkanik & McAlindon

Week 8	Guest Speaker: e.g., <i>Commercializing Technology</i> Validating Your Market in Uncertain Conditions <u>Assignment</u> : Customer Interview Techniques and Validation	Turkanik & McAlindon
Week 9	No Class -- Travel Week	
Week 10	Production/Operations/Marketing Plan Audit Building the Startup Team How to use LinkedIn to building your team	Turkanik & McAlindon
Week 11	Article review and discussion <u>Assignment</u> : Iterating the Business Model	Turkanik & McAlindon
Week 12	Generating Revenue (or How to Get People to Buy) <u>Assignment</u> : Sales Scripting and Sales Process	Turkanik & McAlindon
Week 13	Consulting, Business Model/Plan Presentations. Final reports due.	Turkanik & McAlindon

Date	ICE Summit/Cap (3 weeks) -- Room 107 Welcome to the top of the (business) world!	Guide
Week 14	What did we learn? Sharing the knowledge from each team. Compare and contrast experiences. This lays the foundation the discussion next class.	Turkanik & McAlindon
Week 15	Presentations to Companies Team performance evaluation and review; LinkedIn profile review.	Turkanik & McAlindon
Week 16	Reflections -- how did you transfer knowledge to wisdom? Grades due	Turkanik & McAlindon

Assignment Requirements

The length of an assignment brief is strictly limited to one page (12 point font, 1 inch margins, 1.5 line spacing). Please refer to the "Assignment Rubric" on page 12 for details on how your assignment will be graded. Each assignment brief should have two main sections:

1. **Proposed Action**, in which a specific and actionable course is described;
2. **Rationale**, in which a convincing defense of why the selected course of action is recommended.

The goal of the assignment is to solve the problems and provide a defense.

Students will submit their briefs for evaluation by the professor, at the beginning of class. Individual participation in the class discussion will be evaluated as part of the class participation grade.

Up to six assignments, depending on the organization's situation, will be assigned for discussion throughout the semester. The assignment discussed on **the first day of class** is for illustration purposes and **is not one of the six assignments** to be written up as a brief. Assignment briefs must be turned in prior to the time they are to be discussed, but **will not be accepted** once class discussion of the assignment has begun.

Assignment briefs are graded as:

- A: excellent work, assignment brief format is followed and is grammatically correct, proposed action is specific, and the rationale persuasively supports the proposed solution.
- B: work of the quality normally expected of a graduate student.
- C: work that is below the quality expected in graduate study, assignment brief format is not followed, grammatical errors are contained in the writing, proposed action is vague or tangential to the scope of the assignment, rationale is not persuasive or relevant to the proposed action.

Term Project

For the client project (e.g., strategy development), students will work in teams with their external clients (either startup or later stage). Teams will actively work together to conduct research (internal company and external market based) with their client, their industry and to analyze their current business model and existing strategy. Throughout the semester, meetings should be held with the client by following the consulting process protocol that has been taught in class. The outcome of this work will be the delivery – first to instructors and peers as interim presentation – of a project report and formal presentation to the client at the end of the semester.

Market Opportunity/Competitive Landscape/ Business Model Audit. A description of the marketplace and company's current business model should be discovered and described. Topics to be covered include size and needs of the market, customer behavior, competition and the value proposition of your venture. Questions that might be answered are: Who are their customers? What do they want? How do they get it? How well does the competition satisfy the customers? What is company's idea to achieve customer satisfaction? How is their idea competitively better? What is the overall market opportunity?

Production/Operations/Marketing Plan Audit. A description of the production plan (for manufactured goods) or the operational plan (for a service organization) will be discovered and described. A service blueprint or process flowchart should be included (or developed, if not existing). A description of the marketing activities (not just promotional activities) should be assessed. Both plans should keep in mind the limited budgetary constraints of typical startup/late stage organizations. Questions that might be answered are: how is the company going to do what they said they were going to do? How are they going to deliver on customer satisfaction promises? How are they to communicate to their customers? What are their pricing and distribution strategies?

Organizational/Financial Plan Audit. A description of the legal and organizational structure of the venture should be discovered and described. Financial pro forma's should be assessed (if available), including cash flow, income statements and balance sheets for a three to five-year horizon. Questions that might be answered include: Why might people want to work for the company? What are the assumptions underlying their financial projections? Why might outside investors be interested in their venture? What are their revenue streams? What are their assumed costs? How do they make money? How much money do they make? What is their (investors) return on investment?

Every class will begin with each team presenting a short project update followed by Q&A session.

Presentations of the complete report on strategy audit/ business model/plan will be made on **Class 15**. Presentations will run a maximum of thirty minutes for each team (20 minutes presentation, 10 to 20 minutes Q&A). All members of a team are expected to present at least once during the term. Papers are to be double-spaced with a twelve point font. The maximum page length for the business model/plan is twenty pages including appendices.

The group's grade will be based on the following criteria:

- Thoroughness of the background research
- Clarity of the company's strategy
- Viability and appropriateness of the business model and the market opportunity.
- Specificity and actionable nature of the production/operational, marketing, organizational and financial plans
- The quality and clarity of the oral presentation
- The quality and clarity of the written report
- The persuasiveness of the business concept as expressed in the presentation and paper

Individual grades will be determined from the team's grade and modified based on team member's evaluation of participation. Team members will be asked to evaluate other members using a letter grade format (A, B, C...). Members receiving an average grade of A will receive the team's grade. Team members receiving an average grade of B will receive a grade one letter lower than the team grade. An average grade of C will receive a grade two letters lower and so on.

Team Responsibilities

From your team experience you should have a:

- sense of ownership in the team's product
- fair forum for sharing your opinions
- gain an appreciation of the value of diversity in developing solutions to complex problems
- gain an appreciation for an interdisciplinary approach to problem solving

Your responsibilities to the team include:

- to be cooperative and productive in meetings
- contributing conceptual and analytical thinking
- punctuality and attendance at all team meetings
- participating in oral presentations
- meeting all designated deadlines
- fully participating in the research and development of all team assignments
- to objectively evaluate peers as contributing team members

Should your team have a non-productive member:

In the event that a team member chooses not to fulfill his/her responsibilities, it is in the best interest of the team to elect to relieve that member of future obligations through dismissal.

Assignment Rubric

Content/Development (50%)

Subject Matter:

- Key elements of assignments covered
- Content is comprehensive/accurate/persuasive
- Displays an understanding of relevant theory
- Major points supported by specific details/examples
- Research is adequate/timely
- Writer has gone beyond assignment for resources

Higher-Order Thinking:

- Writer compares/contrasts/integrates theory/subject matter with work environment/experience
- At an appropriate level, the writer analyzes and synthesizes theory/practice to develop new ideas and ways of conceptualizing and performing

Organization (25 %)

- The introduction provides a sufficient background on the topic and articulates the major point
- Central theme/purpose is immediately clear
- Structure is clear, logical, and easy to follow
- Subsequent sections develop/support the central theme
- Conclusion/recommendations follow logically from the body of the paper

Style/Mechanics (25%)

Format

- Citations/reference page follow guidelines
- Properly cites ideas/info from other sources
- Paper is laid out effectively--uses, heading and other reader-friendly tools
- Paper is neat/shows attention to detail

Grammar/Punctuation/Spelling

- Rules of grammar, usage, punctuation are followed
- Spelling is correct

Readability/Style

- Sentences are complete, clear, and concise
- Sentences are well-constructed with consistently strong, varied structure
- Transitions between sentences/paragraphs/sections help maintain the flow of thought
- Words used are precise and unambiguous
- The tone is appropriate to the audience, content, and assignment

APPENDIX A

ICE Program

**STRATEGY AUDIT/ BUSINESS MODEL PRESENTATION
EVALUATION FORM**

NAME:

TEAM CRITIQUED:

	Less than Adequate	Adequate	Good	Excellent
Originality/ Creativity:				
Clarity/Logic of Presentation:				
Thoroughness of the background research:				
Use of appropriate strategic frameworks:				
Sustainability of the market opportunity:				
Clarity and innovativeness of business model:				
Clarity of strategy and necessary organizational capabilities:				
Specificity and actionable nature of the following elements:				
1. production/operational:				
2. marketing:				
3. organizational:				
4. financial plans:				

Comments:

Grade: _____

ICE Program

TEAM MEMBER PEER EVALUATION FORM

GUIDELINES FOR ASSIGNING GRADES

- A.** = Work turned in on time. Work was of high quality. Member contributed to team goals.
- B.** = Work mostly turned in on time. Work of average quality. Member made adequate effort to contribute to team goals.
- C.** = Occasionally late meeting deadlines. Work of inadequate quality. Member made little effort to contribute to team goals.
- D.** = Work was uniformly late. Work was of poor quality. Member made no effort to contribute to team goals.

Team Name: _____

Please do not grade yourself.

NAME

GRADE

1. _____ A B C F
Given the opportunity, I would voluntarily work with this individual again: Yes No

2. _____ A B C F
Given the opportunity, I would voluntarily work with this individual again: Yes No

3. _____ A B C F
Given the opportunity, I would voluntarily work with this individual again: Yes No

4. _____ A B C F
Given the opportunity, I would voluntarily work with this individual again: Yes No

Please provide a justification for your assigned grades (use back if necessary):

NuQuest

NuQuest is the leading provider of Medicare Secondary Payer (MSP) compliance solutions, including Medicare Set-Aside Allocation (MSA), Medical Cost Projection and Professional Administration services. The company has been on the market for over 15 years and is on a high growth trajectory beyond current \$20m revenue and 100+ employees.

Pürlin

Pürlin is a new fabric that duplicates the look and feel of cotton, but works within a closed-loop recycling system that offers numerous benefits to hotels, their guests and the environment. Whether you are an hotelier, a frequent traveler or someone interested in helping to save **Billions of Gallons of Fresh Water** annually, Pürlin will appeal to you.

Pürlin Sheets are a hypoallergenic, individual guest use product that is recycled through a heat intensive process reaching temperatures of approximately 340 degrees Fahrenheit. This destroys bacteria and eliminates the need for powerful detergents, bleaches and sanitizers while dramatically cutting both the water demands and wastewater production associated with laundering cotton sheets.

ecoSPEARS

ecoSPEARS is a cleantech company with innovative environmental solutions to extract and remediate PCBs and other harmful contaminants from earth's lakes, rivers, and navigable waterways. ecoSPEARS is the exclusive licensee of NASA's Sorbent Polymer Extraction and Remediation System (SPEARS) to extract and remediate PCB, PAH, DDT, Dioxins, and other harmful contaminants from Earth's sediments. ecoSPEARS has designed and developed SPEARS for manufacturability and global scalability to address the worldwide multi-billion dollar PCB clean-up problem.

Focused on education, innovation, and sustainability, NASA and ecoSPEARS both collaboratively desire to rid the world of harmful PCBs and other toxic contaminants using the non-invasive, in-situ SPEARS technology.

FleetZoo

FleetZoo is an all in one planning and optimization SaaS platform for fleet operators and mobile workforces such as last mile delivery, HVAC, pest control, landscaping companies as well as city governments. FleetZoo solves their number one daily problem which is how to best assign orders to the fleet in a sequence that will reduce miles, reduce fuel consumption, improve productivity, and increase revenue. FleetZoo has an added bonus of automatically dispatching drivers, notifying customers and

provide full visibility of the fleet and the field operations. FleetZoo was designed so that a fleet operator can easily use it to fully manage the operations from anywhere.

CECO

Since 2001, CECO has been providing hope for families that have been searching for the place where the impossible IS possible. CECO offers a special needs school day kindergarten through 12th grade, summer camp, early intervention ages 6 months to 4 years old and walking challenge program.

Conductive Education is a unique, holistic educational approach to help children with Cerebral Palsy and other motor disabilities achieve their greatest level of independence through physical and cognitive activities. We welcome families and our community friends to stop by and tour our facility...see how hard the children work on a daily basis to obtain their greatest potential.