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MBA 655.50: Strategic Financial Management

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STRATEGIC FINANCIAL MANAGEMENT

MBA 655

(Spring Semester 2003)

COURSE INFORMATION

Instructor: Dr. Clyde W. Neu

Class Schedule: Offered via the Internet
January 6, 2003 – February 14, 2003
Plus class Session in GBB L14 1:30 – 3:00 PM
On Friday, February 7, 2003

COURSE MATERIALS:

Text: Strategic Financial Analysis, by Clyde W. Neu, Available through bookstore at UM with Excel template files included on a floppy disc.

COURSE SUMMARY:

Improving return on investment through tighter financial controls is an elusive goal for many firms. Yet most variables are under management's control. **Strategic Financial Analysis** can be employed to benchmark performance against industry norms, diagnose weaknesses in operations and identify opportunities for improvements. In addition, such analysis can assist one in formulating a financial management strategy that sets the course for a more profitable future.

In this course, students will learn how to:

- * Manage one's business in a strategic context by formulating **goals** and sound financial management strategies.
- * Apply a powerful computer software modeling system (Excel based) in developing a diagnostic analysis of financial statements.
- * Employ various strategic models of financial performance to uncover opportunities for improvement and focus management's attention on strategic modifications.
- * Evaluate and assess the financial impact of a merger/acquisition opportunity.

Students will be exposed to the development of a **framework for strategic financial analysis** that focuses on identifying subtle issues limiting a company's return on investment. A comprehensive business case will be analyzed with several strategic models of financial performance using computer software that supports the course. As the case develops, strategic financial analysis isolates the critical elements of financial performance on which the firm needs to concentrate. The case illustrates a financial **turnaround** achieved by **setting goals** and managing the business through a severe economic downturn. The case concludes with the illustration of an acquisition to strengthen overall competitiveness.

COURSE TIPS:

Students are advised to set up a folder on their computer hard drive for this course, titled something like MBA 655 Strategic Financial Analysis. There will be approximately 20 Excel files and 20 Word documents that students will either download from the server or will find attached with e-mail correspondence sent by the instructor.

In addition, it is recommended that students purchase a three-ring binder (1 ½ inch minimum) to use in organizing their work as the course develops. There will be at least 150 printed pages of material either downloaded from the server, printed from students' analysis of financial data, or attached with e-mail correspondence. This material probably can best be organized by using 15 to 20 sheet dividers with tabs.

COURSE SCHEDULE:

<u>Dates</u>	<u>Topic or Assignments Due</u>
Jan. 10	Part I Review Questions / Problems Due over 29 Page Text plus CSP Computer Systems Financial Data. Instructor will post answer key on January 11.
Jan. 14	Part II Assignment Due using Software Template to Analyze CSP Computer Systems (not to be graded, but reviewed by the instructor so that students become familiar with use of the software). Instructor will post answer key on January 15.
Jan. 20	Part III Assignment Due covering a Strategic Financial Analysis of Monarch Lumber Company in comparison with Industry Average Financial Performance Including Test Questions & Problems. Instructor will post answer key on January 21.
Jan. 24	Part IV Assignment Due covering a Strategic Financial Analysis of 1993 Pro Forma Financial Projections for Monarch Lumber Company in comparison with Company Goals for Financial Performance. Instructor will post answer key on January 27.
Jan. 27	Part V Assignment Due covering a Cash Market Value Analysis of Monarch Lumber Company in 1992 and 1993. Instructor will post answer key on January 28.
Feb. 14	Final Assignment Due: Analysis and Evaluation of the Acquisition of Triad Lumber and Truss Company by Monarch in early 1994.

EVALUATION:

Students' final grades will be based on the scores earned on the best three out of four assignments plus their final project. All assignments must be turned in, but the lowest score received on Parts I, III, IV, and V will be discarded resulting in the assignments representing 60% of the Final Score and the Final Project representing 40%. Weights and letter grades will be assigned as follows:

Part I	20%	A 90% and above
Part III	20%	B 80% to 89.9%
Part IV	20%	C Below 80%
Part V	20%	
Final Project	40%	