



THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

HPM 320

Introduction to Strategic Planning and Marketing

(Credit Hours: 3)

Department of Health Policy and Management
Gillings School of Global Public Health

Spring 2019 Syllabus

Class Location: McGavran-Greenberg 2306

Meeting Times: Thursdays 3:30 – 6:15

Faculty: W. Stan Taylor

Office: NA

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Phone:

Office By appointment

Hours:

TA: Whitney Okie

Office: NA

Email: whitokie@live.unc.edu

Phone:

By appointment

As an adjunct member of the faculty, I do not have an office and therefore have no set office hours. For all questions or situations pertaining to this course, students should always first contact the teaching assistant by email, and he will endeavor to respond within 24 hours. If there are issues that are of a nature that must be directed to the professor, feel free to email me regarding those issues. I am happy to make appointments for individual discussions (which will include the TA and me), preferably before or after our class meeting time.

Course Overview

Unlike other courses that concentrate more narrowly on a particular function or segment of the business, strategic planning and marketing (or, as we will refer to it often, *strategic management*) is a big picture course. It cuts across the entire business and management spectrum. The center of attention is the total enterprise—the industry and competitive environment in which it operates, its long-term direction and strategy, its resources and competitive capabilities, and its prospects for success. This course will provide students with a working knowledge of strategy by investigating the role of strategy in organizational success and exploring how and why some organizations consistently outperform other organizations.

Strategy is not a rulebook, a blueprint, or a set of programmed decisions; it is the unifying theme—the sum of key ideas and concepts—that gives coherence and direction to the numerous and varied decisions made within an organization as it seeks to establish a sustainable competitive advantage. Strategic management is a process; it is never final.

The course will help you synthesize what you have learned in prior courses as well as prepare you to utilize material from future courses and in your career to come. Learning how to manage all the components of an organization makes strategic management an integrative course in which you reach back to use concepts and techniques covered in previous courses, including the courses you completed last semester. The course will include lectures by the instructor, guest lectures from individuals in the health industry, readings, discussion, individual cases and a project in which students will be expected to develop a strategic and marketing plan for a health “client.”

Learning Objectives and Competencies

	Course Learning Objective	BSPH Program in Health Policy & Management Competencies
	<i>By the time students finish this course, they should be able to...</i>	<i>Through this course, students will further develop the following knowledge, skills, and abilities...</i>
1	Develop the capacity/ability to think strategically about an organization, its present position, its long-term direction, its resources and competitive capabilities, the caliber of its strategy, and its opportunities for gaining sustainable competitive advantage.	Health Industry Knowledge Research, Analysis & Problem Solving Skills Strategic Planning and Marketing
2	Describe the core activities when developing strategy and build skills in conducting strategic analysis in a variety of health settings and competitive situations.	Health Industry Knowledge Research, Analysis & Problem Solving Skills Financial Management Information Management Strategic Planning and Marketing
3	Provide hands-on experience in crafting business strategy, reasoning carefully about strategic options, using what-if analysis to evaluate action alternatives, and making sound strategic decisions.	Health Industry Knowledge Research, Analysis & Problem Solving Skills Financial Management Information Management Strategic Planning and Marketing

	Course Learning Objective	BSPH Program in Health Policy & Management Competencies
4	Describe the managerial tasks associated with implementing and executing organizational strategies, the range of actions managers can take to promote competent strategy execution, and provide confidence in being able to function effectively as part of an organization's strategy development team.	Health Industry Knowledge Communication & Teamwork Skills Research, Analysis & Problem Solving Skills Human Resources Management Organizational Understanding Leadership
5	Provide experience in formulating a strategic plan for an organization and recommending a viable course of action given its circumstances. Develop knowledge of techniques to use to prioritize and rank strengths, weaknesses, opportunities and threats (SWOT).	Health Industry Knowledge Communication & Teamwork Skills Research, Analysis & Problem Solving Skills Organizational Understanding Leadership
6	Present and defend recommendations, using intuition to reach defensible assessments and interpretations, or arguing persuasively for a point of view, recognizing that (1) strategy must be crafted using incomplete, partial, or conflicting information and, (2) no set of strategies is necessarily correct.	Health Industry Knowledge Communication & Teamwork Skills Professionalism
7	Understand the power of marketing in a variety of health settings. Understand how to connect a service to a basic human need through communication and promotion strategies.	Health Industry Knowledge Marketing Knowledge Research, Analysis & Problem Solving Skills Strategic Planning and Marketing

Resources

Course Website

The HPM 320 course website can be accessed on Sakai. The website includes this syllabus, which may be updated periodically throughout the semester, as well as other information essential to the course. You should check this site regularly (at least weekly) for announcements and to access newly uploaded materials, in addition to checking your email daily.

Textbook and Other Readings

The health industry is characterized by rapid and constant change. As such, it is imperative to use a variety of resources to obtain current and relevant information. The basic concepts of strategic planning and marketing, however, are foundational for understanding how to apply data and information to improve an organization. To assist with the learning of those concepts, readings will be assigned, including scholarly journal articles, industry reports, government publications, etc. These resources will be available on the course Sakai site, in the public domain (i.e. the Internet) or through the Health Sciences Library. Most of the articles can be accessed online at hsl.lib.unc.edu.

Optional Texts: Although not required, you may also wish to acquire the following optional textbooks, one of which has been used by previous classes (and for which used copies may thus be available):

Ginter, Duncan and Swayne. *Strategic Management of Health Care Organizations*, 7th edition. Wiley, 2013. ISBN: 978-1-118-46646-9

Berkowitz, Eric N. *Essentials of Health Care Marketing*, 4th edition. Jones and Bartlett, 2016. ISBN: 978-1-284-09431-2

Kim, W. Chan and Mauborgne, Renee. *Blue Ocean Strategy: How to Create Uncontested Market Space and Make Competition Irrelevant*. Feb 3, 2005. ISBN 1-59139-619-0 [available used on Amazon for less than \$5]

Gilligan, C., Lowe, R. (1995). *Marketing and Healthcare Organizations*. London: CRC Press., (available on-line through UNC Library)

Cases: Cases will be posted to Sakai, along with the questions that correspond with each assigned part of the case. Students should read the case in its entirety before completely each assignment to ensure full comprehension and understanding of the material.

Required readings:

In addition to specific assigned readings, students must subscribe to and read the following free e-newsletter:

Healthleaders Media Daily News and Analysis:

<http://www.healthleadersmedia.com/2014/ENEWS-3830-HOM/Daily> or
<http://www.pages02.net/blrhealthcaredivision/HealthLeadersNews/>

Other readings will be assigned periodically on Sakai and/or through updates to the syllabus.

In addition to the assigned readings, students will be expected to perform their own research to prepare for class discussions as noted in the schedule on the syllabus or as announced.

Other Helpful Sources

Students are encouraged to explore the following websites, most of which you are familiar with from previous courses:

Kaiser Family Foundation: <http://www.kff.org/>
The Commonwealth Fund: <http://www.commonwealthfund.org/>
Robert Wood Johnson Foundation: <http://www.rwjf.org/>
National Center for Health Statistics: <http://www.cdc.gov/nchs/>
Rand Health: <http://www.rand.org/health/>
The Urban Institute: <http://www.urban.org/>
County Health Rankings: <http://www.countyhealthrankings.org/>

Students are also encouraged to join the Carolinas Society for Healthcare Strategy and Market Development (CSHSMD). Although this is not a requirement, student membership costs \$40 per year (versus \$150 for professionals) and provides the opportunity for excellent educational and networking opportunities with professionals in the industry in the Carolinas. Information is available at <http://cshsmd.org/index.php>. CSHSMD will hold a spring conference later in the semester; I will provide details for those interested as they become available.

Other organizations that are recommended and offer student rates are the local ACHE chapters: Triangle Healthcare Executives Forum (<http://thefnc.ache.org/>) and the UNC student ACHE chapter.

Also recommended is the North Carolina Public Health Association. You may join as a student member at the following website: <https://ncpha.memberclicks.net/join-now> .

Requirements and Expectations

Exams

There are two exams in the course. The exams are designed to evaluate students' accomplishment of the learning objectives detailed in the syllabus.

The first exam is scheduled approximately midway through the semester and covers content from the 1st half of the course. The second exam is scheduled during the final exam period and covers content from the entire course.

The exams are in-class and generally include a combination of true-false, multiple choice, short answer and essay questions. Students may not reference any class materials during the exams (i.e. notes, readings, presentations, etc.), and no electronic devices or media may be used during the exams.

Written Cases

Cases are designed to help students learn the components and process of strategic planning prior to the development of their project, which will entail a complete strategic plan. A total of three (3) cases will be assigned for this course. Cases will be posted on Sakai, along with the questions to which students should respond for each case assignment. Each student is required to submit case assignments for two of the three cases. Case assignments will require independent case analysis. All cases submitted will be assigned a grade. Students may choose to submit all three cases and drop the case with the lowest grade.

The written case assignments are to be prepared on an individual basis. It is expected that the written case will reflect the student's thoughts and analysis rather than the work of others. The criteria for grading written case assignments include:

- Use of appropriate analytical tools, techniques, including the use of charts and tables where appropriate. The student is expected to demonstrate the use of the tools and techniques of strategic analysis presented in the chapters. Both breadth and depth of analysis will be evaluated.
- Presenting realistic, workable, well-supported recommendations for action.
- Use of good communication skills. Cases where students ignore the use of good grammar, spelling and other communication skills (including punctuation, syntax and format) will result in a grade reduction. Do not wait until you have submitted several cases and received poor grades before you seek help in improving your writing skills. A resource for UNC students who need writing assistance is The Writing Center (<http://writingcenter.unc.edu/>).
- Evidence of adequate preparation, pride of workmanship, and display of professional attitude and approach. **All cases are to be submitted via Sakai in PDF format.**
- Sample cases will be made available to provide direction in case preparation. Students are encouraged to review those samples prior to submission of case assignments.

Written case assignments are to be submitted via Sakai no later than 11:55 PM on the due date (see attached schedule). Typically, cases assignments will be due prior to the class in which they are discussed. For example, if a case will be discussed during the February 1 class, the written case submission deadline will be two to three days prior to the class meeting date. The due date/time appears in the detailed schedule below and will also appear on the Sakai calendar when the assignment opens. **LATE CASE ASSIGNMENTS ARE NOT ACCEPTED AND WILL BE GIVEN A GRADE OF 0.**

Class Participation

Given that participation in class discussion of cases counts as a factor in determining the overall grade in the course, each student is expected to contribute to in-class analysis and discussion of the cases and required readings. Each student is expected to be an active participant in discussions and offer meaningful analysis and convincing arguments for the positions taken. The student's grade for class participation is something to be earned by contributing assessments and judgments to the discussion. Merely coming to class and listening to the discussion of assigned readings is not sufficient; attendance is not participation. Students should, therefore, make a conscientious effort to be sufficiently prepared to make intelligent, timely comments regarding the issues raised in the readings and cases.

From time to time, we may guest speakers from the health industry, either in person, via teleconference, or through a video recording. These speakers may provide insight specific to the strategy/marketing discussion scheduled for that class, as well as broader perspectives of the industry. The speakers' backgrounds and expertise will be provided prior to their visit, and students should be prepared to ask questions relative to the course, their area of expertise, or other relevant topics. Students are responsible for material covered by the guest speakers.

Homework Assignments/Quizzes

Homework assignments or quizzes may be given periodically; quizzes may not be announced, particularly if members of the class are not adequately preparing for the class. These assignments or quizzes will be counted as part of the homework/participation grade.

Group Project

The group project will be the completion and presentation of a strategic plan for a specific health organization. Each group will be responsible for completing the project using a combination of in-class time and outside-class time to develop a written strategic plan, with accompanying exhibits, and prepare an oral presentation. Individual students will first be asked to identify their top 3 industry segments (public health, pharmaceuticals, hospitals, physician practices, insurers, CIN/ACO/IPA's, etc.) 8 to 10 groups will be identified based on health industry segments. Group projects will be allocated across these segments. An overview of the project will be presented during the January 10th class.

Additional details regarding the project, including project deliverables, will be included in the Project Guidelines, which will be posted on Sakai prior to the January 27th class.

Class Attendance and Participation

Regular class attendance is critical for success in HPM 320, particularly given that the class meets only once per week. In other words, missing one class is equivalent to missing an entire week of material. While course readings and case assignments are posted on Sakai,

understanding the material requires active participation in class discussions and detailed notetaking. Attendance, along with in-class participation, will be assessed as part of your participation grade. Each student is expected to be an active participant in discussions and offer meaningful analysis and convincing arguments for the positions taken. The student's grade for class participation is something to be earned by contributing assessments and judgments to the discussion. Merely coming to class and listening to the discussion of assigned reading and cases is not sufficient; attendance is not participation. Students should, therefore, make a conscientious effort to be sufficiently prepared to make intelligent, timely comments regarding the issues raised in the cases.

If an expected absence is to occur, please notify the teaching assistant in advance via email. More than one absence without an official excuse will negatively impact the student's participation grade; however, prior notice (in case of an expected absence) may mitigate the impact at the sole discretion of the instructor. Students missing more than one class (i.e. starting with the second absence) without an official excuse will have 10 points deducted per absence from the homework/participation grade. Starting with the fourth absence, five (5) points will be deducted from the student's final grade per absence. Tardiness of more than 15 minutes will be considered an absence, as will departing class more than 15 minutes early. Chronic tardiness will not be tolerated and will be handled on a case-by-case basis at the discretion of the instructor. Absences will only be considered excused if an official excuse is provided by the university-sponsored group that caused the excuse, by a licensed physician or by a UNC administrator.

Policy Regarding Use of Electronic Devices During Class

Laptops and tablets may be used in class to take notes, refer to course materials, and other appropriate uses to support learning. As noted above, no electronics may be used during exams or quizzes. While class is in session, electronic devices should not be used for purposes unrelated to the course. If this policy is violated by one or more students, the use of electronic devices for all students may be suspended indefinitely, at the sole discretion of the instructor.

Evaluation Method

Grade Components

Component	% of Grade
Exam #1	20%
Exam #2	10%

Case Assignments (Total)	20%
Project	40%
Homework/Participation	10%
TOTAL	100%

Grading Scale (may be adjusted)

94 or above: A
 90 to 93: A- 87
 to 89: B+
 83 to 86: B
 80 to 82: B- 77
 to 79: C+
 73 to 76: C
 70 to 72: C- 67
 to 69: D+
 63 to 67: D
 60 to 62: D-
 Below 60: E

Notes:

- (a) Final course grades are not rounded up, e.g. a final course grade of 89.8 will receive a B+.
- (b) Exams will only be rescheduled if an official exam excuse is provided.
- (c) Late assignments will not be accepted [and will receive a grade of zero (0)].

UNC Honor Code

The principles of academic honesty, integrity, and responsible citizenship govern the performance of all academic work and student conduct at the University as they have during the long life of this institution. Your acceptance of enrollment in the University presupposes a commitment to the principles embodied in the Code of Student Conduct and a respect for this most significant Carolina tradition. Your reward is in the practice of these principles.

Your participation in this course comes with the expectation that your work will be completed in full observance of the Honor Code. Academic dishonesty in any form is unacceptable, because any breach in academic integrity, however small, strikes destructively at the University's life and work. In accordance with the Honor Code, students will be required to sign the honor pledge as part of all graded assignments submitted in this course.

If you have any questions about your responsibility or the responsibility of faculty members under the Honor Code, please consult with someone in either the Office of the Student Attorney General (966-4084) or the Office of the Dean of Students (966-4042).

Read “The Instrument of Student Judicial Governance” (<http://instrument.unc.edu>).

Recognizing, Valuing and Encouraging Diversity

The importance of diversity is recognized in the mission statement of HPM. In the classroom, diversity *strengthens* the products, *enriches* the learning, and *broadens* the perspectives of all in the class. Diversity requires an atmosphere of inclusion and tolerance, which oftentimes challenges our own closely-held ideas, as well as our personal comfort zones. The results, however, create a sense of community and promote excellence in the learning environment. This class will follow principles of inclusion, respect, tolerance, and acceptance that support the values of diversity.

Diversity includes consideration of: (1) life experiences, including type, variety, uniqueness, duration, personal values, political viewpoints, and intensity; and (2) factors related to “diversity of presence,” including, among others, age, economic circumstances, ethnic identification, family educational attainment, disability, gender, geographic origin, maturity, race, religion, sexual orientation, social position, and veteran status.

Course Evaluation

HPM participates in the UNC-CH’s online course evaluation system, enabled at the end of the semester by Scantron Class Climate. Your responses will be anonymous, with feedback provided in the aggregate. Open-ended comments will be shared with instructors, but not identified with individual students. Your participation in course evaluation is an expectation, since providing constructive feedback is a professional obligation. Feedback is critical, moreover, to improving the quality of our courses, as well as for instructor assessment.

Accommodations

UNC-CH supports all reasonable accommodations, including resources and services, for students with disabilities, chronic medical conditions, a temporary disability, or a pregnancy complication resulting in difficulties with accessing learning opportunities.

All accommodations are coordinated through the UNC Office of Accessibility Resources & Services (ARS), <http://accessibility.unc.edu>; phone 919-962-8300, email accessibility@unc.edu. Students must document/register their need for accommodations with ARS before accommodations can be implemented.

Key Dates: Spring 2019

Assignment	Due Date
Biographical Assignment and Industry Segment Assignment Due via Sakai	Wednesday 1/16/19 (11:55 PM)
Industry Segment Paper due (1-2) pages	Wednesday 1/23/19 (11:55 PM)
Case Assignment 1 Due	Tuesday 2/12/19 (11:55 PM)
Exam #1	Thursday 2/28/2019 (3:30 PM)
Case Assignment 2 Due	Tuesday 3/5/19 (11:55 PM)
Spring Break	Thursday 3/14/19
Case Assignment 3 Due	Tuesday 4/2/19 (11:55 PM)
Project Due Date Project Presentations	Thursday 4/18/19 (3:30 PM)
Project Presentations Last Day of Class	Thursday 4/25/19 (3:30 PM)
Exam #2	Tuesday 4/30/19 (4:00 PM)

Class Schedule: Spring 2019

Please note that this schedule, including assignments, may be amended during the semester.

Date:	Thursday 1/10/19
Topic:	<p>Introduction, Course Overview and the Nature of Healthcare Marketing</p> <ul style="list-style-type: none"> - Industry segment assignment - Group Project assignment - Exam Date conflict – Let us know ASAP - Biographical Assignment <p>Healthcare Marketing</p> <ul style="list-style-type: none"> - Meeting needs - Designing Services around those needs - Misconceptions
Required Readings:	<p>Course Syllabus posted on Sakai</p> <p>Gilligan, C., Lowe, R. (1995). Marketing and Healthcare Organizations. London: CRC Press, Chapter Two – So what is Marketing? (available on-line through UNC Library)</p>
Assignment Due:	None

Date:	Thursday 1/17/19
Topic:	Health Care Marketing (continued)
Required Readings:	<p>Gilligan, C., Lowe, R. (1995). Marketing and Healthcare Organizations. London: CRC Press., Chapter Three – Developing a Customer Centered Healthcare Organization, and Chapter Nine – Developing the health care Marketing mix (available on-line through UNC Library)</p>
Assignment Due:	<p>Biographical Assignment (due via Sakai by 11:55 PM on 1/16/19)</p> <p>Industry Segment Ranking (due via Sakai by 11:55 PM on 1/16/19)</p>
Skill Session:	Identifying the Purchase Decision Maker

Date:	Thursday 1/24/19
Topic:	<p>Strategic Planning Overview</p> <ul style="list-style-type: none"> - Basic components of a Plan - Process of Plan Development (Overview) - What makes a plan more than a dust collector? Creating actionable, relevant and living plans. <p>Group Assignments</p>
Required Readings:	<p>Porter, M. E. (1996). "What is strategy?" <i>Harvard Business Review</i> 74(6): 61-78 (posted on Sakai under "Course Reserves")</p> <p>Examples of Strategic Plans</p>
Other Readings:	TBD
Assignment Due:	Paper on your Industry Segment Due (due via Sakai by 11:55 on 1/23/19)
Skill Session:	Group Exercise on Selecting Company for Team Project

Date:	Thursday 1/31/19
Topic:	<p>Environmental Assessment</p> <ul style="list-style-type: none"> - Regulatory Environment - Demographics and Community Needs
Required Readings:	<p>Porter, M. E. (2008). "The Five Competitive Forces That Shape Strategy" <i>Harvard Business Review</i> 86(1): 78-93 (posted on Sakai under "Course Reserves")</p> <p>Two "Environmental Analysis" documents on Sakai under "Course Reserves"</p>
Assignment Due:	External Environment Assignment
Skill Session:	Finding and presenting environmental data

Date:	Thursday 2/7/19
Topic:	Competitive Analysis/Research Tools
Required Readings:	Two papers on Sakai (see Course Reserves, articles marked “Competitive Analysis”); read the Stratmann article first
Assignment Due:	
Skill Session	Internal Data, Projections and Financial Analysis - Finding data on competitors; competitive analysis

Date:	Thursday 2/14/19
Topic:	Stakeholders Reasons for Failure Common Struggles
Required Readings:	TBD
Assignment Due:	Case Assignment 1 (due via Sakai by 11:55 PM on 2/12/19)

Date:	Thursday 2/21/19
Topic:	Data and Analytics - Market demand - Growth - Market Research sources Team Project Discussion and Review
Required Readings:	Team Project Instructions posted on Sakai
Assignment Due:	None

Date:	Thursday 2/28/19
Topic:	Exam #1 Group Work on Projects
Required Readings:	None
Assignment Due:	None

Date:	Thursday 3/7/19
Topic:	Developing Strategies - Actionable plans - Accountability Implementing a Strategic Plan
Required Readings:	TBD
Assignment Due:	Case Assignment 2 (due via Sakai by 11:55 PM on 3/5/19)

Date:	Thursday 3/14/19
Topic:	SPRING BREAK

Date:	Thursday 3/21/19
Topic:	SWOT Analysis & Other Techniques for building consensus and engaging stakeholders Q & A on Team Project
Required Readings:	
Assignment Due:	TBD

Date:	Thursday 3/28/19
Topic:	Innovation / Can innovation be taught <ul style="list-style-type: none"> - Regulatory Changes - Technology Changes - Financing Methods - How to respond?
Required Readings:	Blue Ocean Strategy (selected chapters)
Assignment Due:	TBD

Date:	Thursday 4/4/19
Topic:	Creating Incentives for better health outcomes Aligning incentives – Providers, Payers, Patients
Required Readings:	TBD
Assignment Due:	Case 3 (due via Sakai by 11:55 PM on 4/2/19)

Date:	Thursday 4/11/19
Topic:	Connecting Marketing to Strategy Review / Q & A Questions on Team Project Work
Required Readings:	
Assignment Due:	

Date:	Thursday 4/18/19
Topic:	Team Project Presentations
Required Readings:	None
Assignment Due:	Written portion of ALL team projects due before class on 4/19/19

Date:	Thursday 4/25/19
Topic:	Team Project Presentations
Required Readings:	None
Assignment Due:	Team Project Individual Evaluations due via Sakai by Thursday, 4/26/19 at 11:55 PM (after class)

Date:	Tuesday 4/30/19 (4pm) McGavran-Greenberg 2306
Topic:	Final Exam Note: If you have a class that meets Tuesdays at 3:30 PM, there will be a conflict for this exam. You must notify me ASAP so that alternative scheduling can be arranged.