

# Teaching with Purposeful Methodologies and Situational Relevance in Business School Classrooms: A Strategic Management Example

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*Business school graduates constitute 20-25% of university graduates every year in North America. There are longstanding and continuing concerns for management education to become more real-world relevant and responsible. A matrix of teaching and learning types in business schools characterises Doctrinaire and Opinionated Spectator types as less relevant, and Purposeful Methodologies and Situational Manager types as more relevant. Explicit situationalization to orient students inside the here-and-now situational reality is required for relevance. A Situational Strategic Management Approach for situational case analysis is described and its application for more relevant pedagogy outlined.*

## INTRODUCTION

Over the past fifty years, the number of university business and management graduates has grown and business schools have become established worldwide (*Globalization of Management Education*, 2011). In North America, bachelors' and masters' degrees in business administration have come to constitute 20-25% of all university degrees awarded each year (U.S. Department of Education, National Center for Education Statistics, 2013; *CAUT Almanac*, 2013-2014).

For most of this time there have been continuing concerns that business graduates, programs and schools have been lacking relevance to the real world of business management. See, for example, Porter & McKibbin, (1988); Elliott & Goodwin, (1994); *Management Education at Risk*, (2002); Pfeffer & Fong, (2002); Mintzberg, (2004); Bennis & O'Toole, (2005); Khurana, (2007); and Muff, (2012). More specific concerns also have been raised regarding business school research cultures, and the content and learning standards in business school programs (*Eligibility Procedures and Standards for Business Accreditation*, 2003-2015; Pfeffer & Fong, 2004; Harmon, 2006; Khurana, 2007, pp.335-352; Navarro, 2008; *Business Week*, 2009; and Rubin & Dierdorff, (2009). Arum & Roksa, (2011) found that, in comparison to other disciplines, business undergraduate students were most lacking in critical thinking skills. Concerns also have been raised regarding self-serving actions and behaviours of business school graduates-as-managers (Hayes & Abernathy, 1980; Carroll & Mui, 2008) and, also increasingly, their social irresponsibility (*Business Week*, 2008a & b), dubious ethics (*Business Week*, 2009) and questionable morality (Mintzberg, 2009). These continuing concerns are taken as indicating powerful forces in business schools militating against higher quality and more relevant and effective education and student learning.

These forces are seen to be the continuing business school cultural, operational, and administrative authority processes that faculty members must recognise and obey; the performance expectations they must meet; and the work loads and resource constraints that they must cope with, in order to keep their jobs. As sensible subordinates they must spend most time on what counts the most (research publications)

and, therefore, as little time as possible on teaching and service activities that are taken for granted. In school internal and public relations discourses faculty members must mouth the content that administrators want to hear, and this imaging is their cloak for the actualities of classroom teaching (that they really cannot afford to spend time on) and the resultant hardly real-world relevant student learning.

According to Bloom, Engelhart, Furst, Hill, & Krathwohl, (1956):

*“What is needed is some evidence that students can do something with their knowledge, that is, that they can apply the information to new situations and problems... Thus, it is expected that when the student encounters a new problem or situation, he will select an appropriate technique for attacking it and will bring to bear the necessary information, both facts and principles. This has been labelled “critical thinking” by some, “reflective thinking” by Dewey and others, and “problem-solving” by still others... This requires some analysis or understanding of the new situation; it requires a background of knowledge or methods that can be readily utilized... (pp.38 and 39).”*

Real-world relevance is perceived here in terms of situational application-and-use of knowledge to find and use information in-and-of the situation at the time. Educational quality is seen to be of a higher standard to the extent that students, in their courses and programs, learn to use situation investigatory, analytical and critical thinking for problem-solving. Real-world relevance and critical thinking are the two sides of the situational application-and-use coin.

This paper considers possibilities for motivating faculty members to move to more real-world situationally relevant teaching for student learning. A basis for consideration is a matrix classification of four generic types of teaching and learning: Doctrinaire, Opinionated Spectator, Purposeful Methodologies, and Situational Manager. In line with Skipton & Furey, (2017) Doctrinaire and Opinionated Spectator teaching and learning of normative, general but situationally non-relevant textbook theory are seen as to-be-expected teacher responses to historically ongoing Bloom Taxonomic educational orthodoxy, and the pressures of institutional cultural, operational and authority processes. A possible way towards more real-world relevant and higher standard student learning is suggested to be through Purposeful Methodologies and Situational Manager types of classroom teaching and learning. A Situational Strategic Management (SSM) Approach is described as a vehicle for combined Purposeful Methodologies and Situational Manager teaching and learning in the classroom. The SSM Approach is explicitly situational where information is sought in-and-of the situation at the time, and critically analysed.

In strategic management practice especially, a situational approach is required because real-world combat arenas, sports and business competition are dynamic and changing here-and-now situations. Only those who make no situational mistakes, either of omission or commission, can expect to not lose. Only those who do not lose are able to identify or create situational opportunities and/or take advantage of the mistakes of others and so be able to gain advantage and win.

## **TYPES OF TEACHING AND LEARNING IN BUSINESS SCHOOLS**

A matrix characterisation of four perceived teaching and learning types in business school classrooms is described in Figure 1 below. It is based on axes of Perspective Relative to Real-World Situation: Inside, or Outside, versus Knowledge or Information: Relative to the Here-and-Now Situation, or Received Theory in the Classroom. Four generic types of teaching and learning are characterised: Doctrinaire, Opinionated Spectator, Purposeful Methodologies, and Situational Manager.

### **Doctrinaire Teaching and Learning**

Bloom et al, (1956) described a taxonomy of educational objectives and cautioned that: *“Because of the simplicity of teaching and evaluating knowledge, it is frequently emphasized as an educational objective out of all proportion to its usefulness or its relevance for the development of the individual*

(p.34).” This is descriptive of Doctrinaire teaching that is classroom-oriented, teacher-centric, textbook theory knowledge-bound, and gives no consideration to practical application-and-use in real-world

**FIGURE 1.**  
**A MATRIX OF TEACHING AND LEARNING TYPES**

<b><i>KNOWLEDGE OR INFORMATION</i></b>	<b><i>PERSPECTIVE RELATIVE TO REAL-WORLD SITUATION</i></b>	
	<i>Outside the Situation</i>	<i>Inside the Situation</i>
<i>Relative to the Here-and-Now Situation</i>	Opinionated Spectator	Situational Manager
<i>Prior Received Theory in the Classroom</i>	Doctrinaire	Applicable Methodologies

situations. In line with Skipton & Furey, (2017) business school authority forces driving Doctrinaire teaching are seen to be: high rewards for research publications and grants; assigned and taken-for-granted teaching responsibilities with large classes and minimal resources; and, requirements for high scores from students in Course and Teaching Evaluation Questionnaires (CTEQ’s). Not surprisingly, faculty members can find more time for research, and for writing grant proposals and publications, by minimizing time and effort spent on teaching. (See Kerr, 1995; and Khurana, 2007.) Course content can be limited to straightforward knowledge only, with teaching-only-the-textbook using the publisher’s instructional support package for Powerpoint presentations and multiple-choice testing. Combined with judicious grade inflation Doctrinaire teaching can influence students to give teachers high CTEQ scores. This is hardly the high quality, real-world relevant classroom teaching and learning that are talked about in business and management education discourse and documentation.

Students can learn (wrongly) that general, normative or prescriptive so-called management theory only has to be applied “scientifically” (i.e., without situation analytical and critical thinking) in the real world to get the right answer. Doctrinaire graduates-as-managers have learned to say normatively or prescriptively what should be considered, or what should be done. These mouthings usually are to the considerable annoyance of peers and subordinates who are doing it!

**Opinionated Spectator Teaching and Learning**

Spectators looking at any situation from the outside only can be non-relevant lookers-on and able to offer only face-value observations and intuitive opinions. Classroom discussions of business management examples or cases can put students in the role of spectators where they can be expected to label items at face value, provide theory normative or prescriptive knowledge commentary, and offer intuitive opinions to the class. Students-as-spectators are in no position to do any situation analysis, critical thinking or problem-solving (Skipton & Furey, 2017). Opinionated Spectator teaching and learning can be seen as Doctrinaire teaching and learning illustratively applied to some case context, but not in the case situation. As such, it may be equated with the detached approach described by Mintzberg, (2009) as prevalent in American business school classrooms and leading to management hubris and failure.

So-called “SWOT (Strengths, Weaknesses, Opportunities, Threats) Analysis” appears to be a dominant orthodoxy for classroom discussions of case exercises. As it may be taught in practice, it can become a vehicle for Opinionated Spectator teaching and learning. Students need not be required to carry out any real situation analysis from an insider perspective. Instead, they can be allowed to take words and

phrases in the case at face-value, intuitively put them into SWOT categories, shout out these “SWOT’s” in class and be rewarded with participation marks.

Sadly, through doing so-called SWOT Analysis students can come to believe (wrongly) that they are doing real-world oriented, purposeful situation analysis. Unfortunately, they cannot be real-world relevant because they have experienced no real situational orientation where they had to find and use information in and of the situation at the time, for analysis, problem definition and problem solving. Opinionated Spectator graduates orient themselves outside the situations that they are dealing with. They can express their opinions but they cannot really know the situation that they are talking about – again to the considerable annoyance of those peers and subordinates who actually are dealing with the situation!

### **Purposeful Methodologies Teaching and Learning**

This is the teaching of inherently real-world relevant and therefore useful standard methodologies, including procedures and frameworks. It is students learning what to do and how to do it, in terms of purposeful in-situation investigation and problem-solving generally and in various type-situations. Purpose always is in mind in terms of contextual effectiveness, efficiency and flexibility (as improvement response and innovative initiative). Only students who learn such methodologies have the means effectively to situationalize to find information in and of the real-world situation at the time, and identify, define and solve problems and opportunities.

Methodologies can be based on textbook knowledge frameworks. Students must, however, develop their own information search and literacy skills to search for and find contextual and situational information. They also must develop their own situation-analytical and critical thinking skills to be able to establish a method to find and use situational information and to identify and define the problem, challenge or opportunity. Students can develop information search and literacy skills through exercises requiring them to search for and obtain real-world information on large companies and their strategies. Such exercises need to be purposeful but minimally directive and left open-ended, as there can be no skills development if students are given lists of information to find and told specifically where to find it. The analogy of the crime scene investigator who knows what to look for and where to look is useful as no-one is going to tell the crime scene investigator what specific evidence is around nor specifically where it can be found.

### **Situational Manager Teaching and Learning**

Students are oriented inside the situation and as investigators and critical thinkers they must situationalize in searching for and finding information in and of the situation at the time. This can assist them in learning to be relevant Situational Managers in real-world situations. Again, purpose always is in mind in terms of situational effectiveness, efficiency and flexibility, both situation-analytically and with regard to future strategy and planning. The Situational Manager teaching and learning type must involve use of Applicable Methodologies. The teaching usefully can put students in the role of being a detective, to investigate and analyse the situation through deriving information in-and-of the situation at the time. Detectives have check-lists of procedures and methods, and of places to look for evidence, but these are tailored to the particular crime scene or situation at the time. Detectives must be researchers, information literate and analytical, critical thinkers in finding and interpreting evidence and in identifying opportunity, means and underlying motive. When students have identified the business managerial problem or opportunity for action they must move from the detective perspective to the managerial perspective of deciding what is to be done, what to do and what actions to take.

## **SITUATIONAL STRATEGIC MANAGEMENT (SSM) APPROACH:**

### **1. INSIDE-SITUATION ORIENTATION**

Strategic analysis in the situation at the time is learning to look in the right places, to ask the right questions, to search for and find the right information, and to identify the important issue(s), problem(s)

or opportunities. In a real strategic situation the analyst is not told what information to search for, where to look for it, what questions to ask, nor what the important issues may be.

The SSM Approach explicitly includes as a first step the analyst's orientation inside the situation reality. It explicitly links strategy concepts and frameworks with strategic analysis of performance in the changing here-and-now reality. Going on from this, the analytically projected future there-and-then is the basis for situational strategy formulation for the future. The analyst must be oriented inside the case situation so that s/he can undertake situationalization of information search, find information in-and-of the situation at the time, and understand the situational reality. Textbook theory can provide frameworks or checklists indicating objectives to have in mind and things to look for. Students must develop their own situation-analytical and critical thinking skills to be able to proceed from observed data to information, findings and conclusions that identify and define the situational problem, challenge or opportunity. It is then relatively straightforward to decide on objectives and formulate strategy in-and-for the situation, and to determine a course of action and implement it.

The strategic gap concept provides a convenient and effective means for establishing the time frames for situational analysis and the timings for strategy implementation. Analysis of the past and present situation and performance results leads to analytical projections of future expected performance outcome. This is used as the basis for specifying desired performance outcome and then formulating the future situational strategy and implementation to achieve it. The difference between the expected outcome and the desired outcome at the future planning horizon is the strategic gap that is to be closed through future strategy for improved performance, and its implementation. Situation orientation will include identifying and recording the following information:

1. Date of the situation to be analyzed, and the date(s) of the latest financial statements and other information.
2. The analyst's insider perspective, e.g., independent consultant to the president or to the board. (This is so that the analyst has the same situational perspective as these actors but can think independently.)
3. The initial strategic consideration, i.e., problem/opportunity or decision that indicates why the situation needs further study. (This may be only a face-value indication or symptom of the real fundamental or underlying problem or decision that must be identified through analysis.)
4. Why is the company or the decision-maker(s) facing this opportunity, problem, or decision here and now? (This may be an identifiable event or it may be only a face-value indication or symptom.)
5. Where is the decision-maker or group of decision makers coming from? In other words, what do they believe that they need to accomplish to keep their jobs and/or achieve their (business or personal) financial and other objectives? (This is explicit recognition of decision-maker self-interests, some of which may be indicated at face-value while others that are underlying will need to be identified through investigation.)

The analyst needs to build his or her own situation orientation in his or her own mind. It is most important therefore, that information is abstracted from the case study and written down under each orientation item. There can be no situational orientation if information simply is highlighted where it occurs in the case and left as such.

Case teaching notes typically contain some initial strategic consideration and questions or other suggestions that can be provided to students to use in their own situation analyses and problem or opportunity identification. It is most important at this orientation stage that students learn that items of information should not be accepted at face-value or taken as unquestionable. Critical assessment begins at this orientation stage. Students can learn to take a skeptical and cynical view, to undertake their own investigations and critical assessments, and come to their own views and conclusions. For example, just because a company president is quoted as saying that s/he wants an aggressive growth strategy for the future does not mean that this is left unquestioned and put forward as the strategy recommendation. Students must identify where the president is coming from and they must analyze the strategic situation of the company and come to their own conclusions and recommendations. The SSM Approach leads

students to analyze fully the present strategic situation of the company before they start thinking about what to do in the future, and it also systematizes the thinking for the future.

## **SITUATIONAL STRATEGIC MANAGEMENT APPROACH: 2. PROCESS CONCEPT**

Strategic management textbooks generally provide similar, generally applicable normative or prescriptive concepts of strategic management and strategy, with some discussion of strategy components. See, for example, Carpenter, Sanders and Harling, (2012); Pearce & Robinson, (2013); Thompson, Peteraf, Gamble & Strickland (2014); and, Hill, Schilling & Jones, (2017). The process concept described here is rather different because it is intended as a basis for applied in-situation strategic analysis and strategy formulation.

### **Strategic Gap Time-Frames for Analysis and for Planning**

The textbook strategic management process generally is seen as consisting of: Analysing -> Planning (inc. Strategy, Resourcing and Organizing) -> Implementing and Executing -> Monitoring and Controlling -> Feedback information inputs to the next cycle of Analysing -> etc. Strategic analysis can be seen as starting with observable company activity and performance indicators (as data, information and findings) and moving to conclusions on the underlying present strategy directions and positioning. Analysis also includes future analytical projections of current strategy and expected performance, as the baseline for future strategic gap considerations. Strategic planning can be seen as starting with this baseline projection and then visualizing desired strategy directions, positioning and performance targets as the strategic gap to be closed in the future. The central element of planning is the formulation of corporate strategy and implementation to close the future strategic gap.

It is most important to do all past-and-present analysis before moving to future analytical projections; and to do all future analytical projections before moving to future strategic planning. Past-and-present situation analysis should not be confused with future analytical projections or future planning. If so, information becomes confused with imagination and the logic of the analysis followed by planning is lost.

### **The SSM Approach Framework for Situationalization and Critical Thinking**

The SSM Approach as a robust concept is shown in Figure 2 below. The essential bases for situationalization and critical thinking are Managerial Concerns, Preferences and Objectives (MCPO's) together with the Corporate Strategy (including its constituent strategies) intended to achieve these MCPO's. In analyzing any strategic situation, what to look for is indicated by the MCPO's tailored by the analyst to the specific case or real situation. Where to look is indicated by the components of the particular situational strategy and/or constituent strategies that are being considered at the time. MCPO's and strategy components are ordered starting with considerations of external factors and proceeding to internal factors. This is deliberate, as strategy is in light of external, business environmental factors, and considerations and the internal organization and operations of the company must be adjusted accordingly. Analysis, strategy formulation and implementation planning therefore must proceed "outside-in."

#### **Managerial Concerns, Preferences and Objectives (MCPO's)**

These are strategic positioning and performance items for achievement or development. All MCPO's should be in mind at the start of any situation analysis or planning and their relative importance will become clear as the process proceeds and more information is found. MCPO information can be sought for the company and its current and potential competitors. MCPO's are categorized as follows:

Business Model (inc. Value Proposition)

- MCPO1. Customer value connections for products or services
- MCPO2. Business sales revenue, profitability and profits
- MCPO3. Industry key success factors, competitive differentiators and (dis)advantages
- MCPO4. Market exploitation and expansion

Market Competitive Performance and Position(ing)

- MCPO5. Customers, segments, markets and competitors

Company Financial Performance and Position(ing)

- MCPO6. Company financial statements

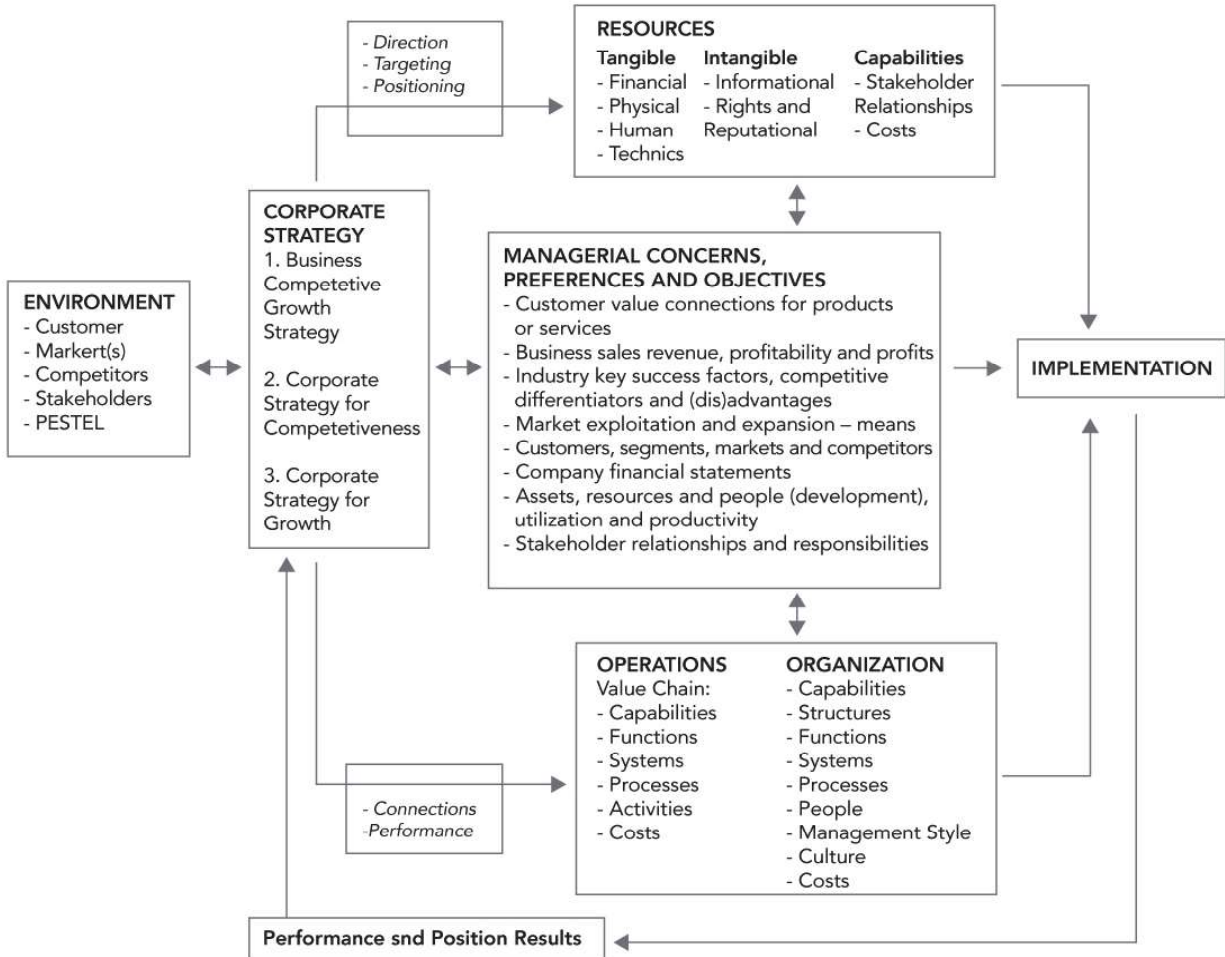
Assets and Resources Performance and Position(ing)

- MCPO7. Assets, resources and people (development), utilization and productivity

Societal and Stakeholder Relationships Performance and Position(ing)

- MCPO8. Stakeholder relationships and responsibilities

**FIGURE 2.**  
**SITUATIONAL STRATEGIC MANAGEMENT APPROACH FRAMEWORK**



While the above ordering of MCPO's conveniently may be followed generally it is up to strategists to determine which MCPO's are most important to them in their own specific situations.

### Corporate Strategy

This is the connection between the company and its environment, including customers and competitors as shown in Figure 2, and is seen as constituted by:

- Business Competitive Growth Strategy, including strategy components:
  - SC1. Strategy (customer – product-or-service) connections and directions

- SC2. External customers, markets, competitors and stakeholders
- SC3. Company resources and capabilities: quantity, nature and deployments
- SC4. Company functions operations: quantity, nature and deployments
- SC5. Company organization and people: quantity, nature and deployments
  
- Corporate Strategy for Competitiveness, including constituent strategies:
  - CSC1. Industry-market technology and product-or-service improvement strategy (based on customer – product-or-service connections)
  - CSC2. Company customer, market and stakeholder development strategy
  - CSC3. Company resources and capabilities development strategy
  - CSC4. Company functions operations and processes development strategy
  - CSC5. Company organization and people development strategy

Each of these constituent strategies is focused on the corresponding strategy component SC1-SC5 as indicated above.

- Corporate Strategy for Growth, including constituent strategies:
  - CSG1. Company industry-market technology and customer innovation strategy
  - CSG2. Company integrative growth and diversification strategy
  - CSG3. Company geographic and international business strategy
  - CSG4. Company multi-business strategy
  - CSG5. Company restructuring strategy (business/financial/organizational)
  - CSG6. Company stakeholder growth strategy

Each of these constituent strategies contains the strategy components SC1-SC5 as indicated above.

Corporate strategy for growth therefore can be visualized as a matrix with constituent strategies as column headings, and with strategy components as row headings. Each of the “boxes” in the matrix can be seen as containing relevant MCPO’s, and as a places to put relevant categorial information from, or imaginative ideas on the situation.

### **SITUATIONAL STRATEGIC MANAGEMENT APPROACH: 3. SITUATION ANALYSIS**

Strategic management textbooks provide basic frameworks for external and internal analysis. See, for example, Carpenter, Sanders and Harling, (2012); Pearce & Robinson, (2013); Thompson, Peteraf, Gamble & Strickland, (2014); and, Hill, Schilling & Jones, (2017). The SSM Approach uses these and other frameworks situationally, to search for and find information in and of the situation at the time.

Situation analysis usefully can be started with consideration of Business Competitive Growth Strategy, including relevant MCPO’s 1-8 and strategy components SC1-SC5. This analytical framework can be envisaged as a matrix with strategy components as column headings and MCPO’s as row headings, as shown in Figure 3 below. Forty individual MCPO/SC relationships as “boxes” in the matrix can be seen as places for relevant categorial information from the situation. It is for the analyst to decide what MCPO/SC relationships are most relevant to explore in any situation. It is suggested, however, that analysis usefully can be started by searching for information on the business model, i.e., relationships between MCPO’s 1-4 and strategy components SC1, strategy connections, and SC2, environment.

#### **Analysis of Past and Present Situation**

The analyst needs to build his or her own situation analysis in his or her own mind. The analysis must be a “sort out job” where information is identified in the situation and explicitly categorized by the analyst. It is most important, therefore, that information is abstracted from the case study and written



down for each Figure 3 MCPO/SC box, as the analyst sees fit. There can be no analysis if items of information merely are highlighted where they occur in the case and left as such. (In the real world information does not come conveniently packaged as in case exercises!)

**FIGURE 3.**  
**SITUATION ANALYSIS: BUSINESS COMPETITIVE GROWTH STRATEGY MCPO AND STRATEGY COMPONENTS RELATIONSHIPS MATRIX**

<b>MANAGERIAL CONCERNS, PREFERENCES &amp; OBJECTIVES</b>	<b>STRATEGY COMPONENTS</b>				
	<i>EXTERNAL</i>		<i>INTERNAL</i>		
	<i>SC1 Strategy Connections</i>	<i>SC2 Environment</i>	<i>SC3 Resources</i>	<i>SC4 Operations</i>	<i>SC5 Organization &amp; People</i>
<i>MCPO1. Customer Value</i>	MCPO1/SC1 Considerations  (Start analysis Here)	MCPO1/SC2	MCPO1/SC3	MCPO1/SC4	MCPO1/SC5
<i>MCPO2. Business Financials</i>	MCPO2/SC1	MCPO2/SC2	MCPO2/SC3	MCPO2/SC4	MCPO2/SC5
<i>MCPO3 Industry KSF's &amp; Competitive (Dis)Adv's</i>	MCPO3/SC1	MCPO3/SC2	MCPO3/SC3	MCPO3/SC4	MCPO3/SC5
<i>MCPO4 Market Exploitation &amp; Expansion</i>	MCPO4/SC1	MCPO4/SC2	MCPO4/SC3	MCPO4/SC4	MCPO4/SC5
<i>MCPO5 Customers, Segments, Markets &amp; Competitors</i>	MCPO5/SC1	MCPO5/SC2	MCPO5/SC3	MCPO5/SC4	MCPO5/SC5
<i>MCPO6 Company Financials</i>	MCPO6/SC1	MCPO6/SC2	MCPO6/SC3	MCPO6/SC4	MCPO6/SC5
<i>MCPO7 Assets, Resources, People</i>	MCPO7/SC1	MCPO7/SC2	MCPO7/SC3	MCPO7/SC4	MCPO7/SC5
<i>MCPO8 Societal &amp; Stakeholder Relationships</i>	MCPO8/SC1	MCPO8/SC2	MCPO8/SC3	MCPO8/SC4	MCPO8/SC5

Some considerations for MCPO's are indicated as follows, largely focusing on the company but similar information can be sought for competitors. MCPO1 customer value connections for products or services can be identified based on marketing mix items, i.e., the "4-P's" of Product-or-Service, Pricing, Promotion and Placement, and also Purchase experience and People as identified customers or customer segment(s). The product-or-service technology (as it may relate to industry technology) also can be assessed. MCPO2 business sales revenue, profitability and profits generated by customers, customer groups or segments, or geographic regions or segments can be sought. Similarly, this information can be found for company products or product lines. Pareto or 80/20 analyses can be carried out as needed to identify the customers and the products-or-services that bring in the most revenue and the most profit. (On this basis, strategy for the future is straightforward: 1. Make more profit from the customers that buy the most and from the products-or-services that sell the most! 2. Sell more to the customers that generate

the most profit, and sell more of the products-or-services that generate the most profit!) MCPO3 industry key success factors, competitive differentiators and (dis)advantages can be identified based on marketing mix items for the company and competitors. It may be that definitive assessment can be made only after MCPO5 market competitive position(ing) and performance have been assessed. (A company whose sales revenue and/or profit growth is above the average for the market or segment is likely to have competitive advantage in its positioning.) MCPO4 market exploitation and expansion includes position(ing) and performance of means for market exploitation, e.g., internal development, alliance, joint-venture, acquisition, and means for market expansion such as user segment and/or geographic directions and speed of movement.

Market competitive performance and position(ing) can be identified based on MCPO5 customers, segments, markets and competitors. As a first step, the market and its segments can be identified and described, and then sizes and growth rates can be sought in unit and dollar terms for: the market, its segments, and company and competitor shares by segment. Further analyses, such as Porter, (1980) “Five Forces” can be carried out based on information that may be obtainable. Financial position(ing) and performance is based on MCPO6 company financial statements. Size and growth rates of revenue, profits and large expenses can be found. Company profits should be increasing at least at the same rate as sales revenue and, ideally, at a greater rate. The usual ratio analyses for returns on investment and equity, working capital, leverage, etc., can be carried out and trends over time established. Assets and resources position(ing) and performance can be assessed under MCPO7. Asset and resource utilizations can be found from financial statements analyses. Measures of productivity can be sought from operational information. Societal and stakeholder relationships and responsibilities, position(ing) and performance can be assessed under MCPO8. Stakeholders other than customers and competitors can be identified, along with their potential to beneficially or adversely affect the company. The societal stakeholding is becoming increasingly important as the driver for ethical, corporate social responsibility and business sustainability considerations.

Once information on the external business model relationships (MCPO 1-4/SC1-2 relationships) has been obtained, other relationships in the matrix can be explored as considered appropriate for the analysis. For example, information on MCPO1, customer value relationships with strategy components SC3 resources; SC4 operations; and SC5 organization and people, can be sought. Similarly, information on MCPO7 relationships also with strategy components, SC3, 4 and 5 can be sought. The pattern of analysis will become evident based on the MCPO information that is being sought and the strategy component information that is found. The ordering of the MCPO’s 1-8 and the strategy components SC1-5 is seen to be generally workable but is not fixed. Some other ordering can be used depending on the nature of the situation. It is strongly suggested, however, that an external-to-internal direction of analysis be preserved as far as possible.

The generic Ansoff (1965) product-market matrix, shown in Figure 4 below, can be used as the basis for structuring analytical conclusions on the present Business Competitive Growth strategy. This matrix provides generic categories into which the existing business(es) of the company and any recent initiatives for growth can be categorised. This categorisation also provides the basis for analytical projections of the future and for strategy formulation for the future.

Based on MCPO5, business environment, findings, present External Opportunities, Threats and Concerns-Issues-Challenges can be concluded. Business model MCPO1-MCPO4 factors may be categorized into present External Competitive Advantages, and Challenges-or-Disadvantages.

Based on findings for MCPO6, company financial performance, and MCPO7, assets, resources and people, present Internal Competitive Strengths, and Challenges-or-Weaknesses can be concluded. The ordering of these conclusions is important because situation analysis works from the outside-in. It is only in light of external Opportunities, Threats and Concerns-Issues-Challenges, and External Competitive Advantages, and Challenges-or-Disadvantages that company Strengths, Weaknesses and Concerns-Issues-Challenges can be properly identified.

The present Corporate Strategy for Competitiveness always should be considered and can be identified as far as may be possible, as initiatives for continuous improvement in MCPO1-8 performance

and positioning relative to strategy components SC1-5. Corporate Strategy for Growth (CSG), as appropriate constituent strategies can be identified as far as may be possible from information in the case situation. Ideally, the present CSG1, company industry-market technology and customer innovation strategy, and CSG6, company stakeholder growth strategy, always should be considered, whatever the company's particular strategic market and financial situation. Other CSG constituent strategies likely will be more situation dependent. Each of these CSG constituent strategies can be envisaged as consisting of

**FIGURE 4.**  
**ANSOFF PRODUCT-MARKET MATRIX**

<b>PRODUCT OR SERVICE</b>	<b>MARKET OR SEGMENT</b>		
	<i>Existing</i>	<i>Geographic Expanded</i>	<i>New Users</i>
<i>Existing</i>	Existing Market or Segment Existing Product or Service  (Market Penetration)		New Market or Segment Existing Product or Service (Market or Segment Development)
<i>Extended</i>			
<i>New</i>	Existing Market or Segment New Product or Service  (Product or Service Development)		New Market or Segment New Product or Service  (Innovation/ Integrative Growth/ Diversification)

(The matrix shown here is for existing or unchanging technology. If there is new technology then an additional row for "New Technology, New Product-or-Service can be added.)

MCPO's 1-8 and strategy components SC1-SC5, as described above for business competitive growth strategy, and related as indicated in Figure 3. As described immediately above for business competitive growth strategy, external opportunities, threats and concerns-issues-challenges, external competitive advantages and challenges-or-disadvantages, and internal competitive strengths and challenges-or-weaknesses can be concluded.

**Analytical Projections and Expectations for the Future**

Based on the past-and-present findings for MCPO5 market competitive environment, positioning and performance, future analytical projections of expected trends, developments and changes in the company's present business(es) (categorized according to Figure 4 above) can be made systematically. These can lead to conclusions on future projected External Opportunities, Threats and Concerns-Issues-Challenges. Second, and also based on past-and-present findings, business model MCPO1-MCPO4 future analytical projections can be made (in light of MCPO5 projections). These can lead to conclusions on future projected External Competitive Advantages and Challenges-or-Disadvantages. Third, and similarly based on past-and-present findings, MCPO6, company financial performance, and MCPO7, assets, resources and people, future analytical projections can be made (in light of MCPO5 and business model MCPO1-MCPO4 projections). These can lead to conclusions on future projected Internal Competitive Strengths and Challenges-or-Weaknesses.

Considering market, business and company financial performance together is deliberate. Perhaps the performance of the business model and the financial health of the company are expected to decline in the

short-term and these things must be dealt with before a market growth strategy for the longer term can be effectively implemented. Where important in the situation, future analytical projections of other MCPO's and/or company internal strategy components (SC3-resources, SC4-operations and SC5-organization) also can be done, and conclusions made.

These projections form the baseline, to the planning horizon, for envisioning the strategic gap between what performance and positioning is expected and what is desired. It is important to note the importance of the time frame. Analytically projected future trends and developments can be concluded to be future opportunities or threats, even though they may not be impacting at the present time. Also, present competitive advantages can change to become future disadvantages. (If information to make a projection is not available, a horizontal straight line can be projected at the level of present sales revenue performance, as an artificial baseline into the future.)

The present Corporate Strategy for Competitiveness, and Corporate Strategy for Growth (as CSG constituents) can be revisited from a future projection perspective, and conclusions may be drawn for future external opportunities, etc, competitive advantages, etc., and internal strengths, etc.

### **SITUATIONAL STRATEGIC MANAGEMENT APPROACH: 3. SITUATIONAL PLANNING INCLUDING STRATEGY FORMULATION AND IMPLEMENTATION**

The future analytical projections of expected MCPO positioning and performance as described above are the baseline and the planning horizon for envisioning the strategic gap between these expectations and what is desired. Corporate strategy and implementation can be formulated as MCPO positioning and performance to be achieved in moving from the present to the future time horizon, to close the envisaged strategic gap. Always in strategic planning there are trade-offs between long-term sales revenue growth (and the investments needed to produce this growth) versus short-term profitability, profits and returns (to satisfy shareholders' requirements for return on investment and management desires for profit-based bonuses).

Corporate strategy is constituted by: Business Competitive Growth Strategy, Corporate Strategy for Competitiveness, and Corporate Strategy for Growth. Business Competitive Growth strategy for the future can be formulated based on the categorized business(es) of the company as used for future projections of performance and positioning. This formulation is based on present findings and future projections for MCPO 1-8 and strategy component SC1-5 items, and any conclusions for external opportunities or threats, competitive advantages or disadvantages, and internal strengths or weaknesses. Business Competitive Growth Strategic strategies for the future can be systematically considered as market penetration, product development, market development and innovation/diversification, as tailored to the company's businesses or possible initiatives in its particular situation at the time.

Corporate Strategy for Competitiveness always will be needed for the future, and can be formulated based on strategy components SC1-5 for continuous improvement. Corporate Strategy for Growth (CSG), as appropriate constituent strategies, can be formulated. It is likely that CSG1, company industry-market technology and customer innovation strategy, and CSG6, company stakeholder growth strategy, always will be needed whatever the company's particular strategic market and financial situation. Other CSG constituent strategies likely will be more situation dependent. Each of these CSG constituent strategies has MCPO's 1-8 and strategy components SC1-SC5 considerations as the business connection or functional operational areas in which business activities take place, to implement and execute the strategies and deliver results and performance.

### **CONCLUSION**

Bloom et al., (1956) pointed out: "*What is needed is some evidence that students can do something with their knowledge, that is, that they can apply the information to new situations and problems...*(p.38)." Concerns for business school management education to become more real-world relevant still are continuing. The important situational dimension appears to have been lost as Bloom's

Taxonomy has become the dominant orthodoxy of educational discourse, institutional processes, programming and documentation. Second, and compounding with Taxonomic orthodoxy, business school organizational culture, operations, and administrative authority processes are drivers towards less relevant classroom content and teaching practices by faculty members who must “publish or perish.”

Orientation inside the real-world here-and-now situation is required for relevance. A matrix of teaching and learning types in business schools has been put forward and Doctrinaire and Opinionated Spectator types seen as characteristic of less relevant teaching. More relevant teaching and student learning was seen as requiring standard Applicable Methodologies that could be used in any and all situations, with explicit situationalization to orient students inside the here-and-now situational reality so that they would take on the role of Situational Managers.

A Situational Strategic Management (SSM) Approach has been described as both a conceptual framework and standard methodology intended to enable students to learn Applicable Methodologies and to become more real-world relevant Situational Managers. The investigative and evidential thinking of crime scene investigators and detectives was seen as analogous to corporate strategic situation investigative analytical and critical thinking based on information in and of the situation at the time. To facilitate critical thinking the SSM Approach includes a hierarchy of defined terms, especially regarding corporate strategy and its constituent strategies. The SSM Approach facilitates situationalization through the centrality of a standard set of managerial concerns, preferences and objectives (MCPO’s 1-8)) and a standard set of strategy components (SC’s 1-5), all considered systematically and interactively.

Ongoing institutional authority processes in business schools are likely to continue, and faculty members who want to keep their jobs are going to continue to do what they have to do, i.e., maximise time for research and publication efforts and minimise time on teaching and service. (See Kerr, 1995; and Khurana, 2007.) Minimum-time Doctrinaire and Opinionated Spectator pedagogies that are knowledge-bound and lacking relevance to real-world situations therefore can be expected to continue.

It is suggested, however, that more relevant and higher quality Purposeful Methodologies and Situational Manager types of teaching and learning need take little extra time. For each case that is discussed in class a guide note can be prepared, based on the SSM Approach and using the same standardized method for all cases but situationalizing for each case. Students can be taken through the MCPO information to be sought, and they can be provided with indications of where to find it (in regard to relevant strategy components). Once the guide notes have been written they become vehicles for student self-learning, road maps for classroom discussions, and marking schemes for case assignments. Students can learn business analysis as an important element of the business professional “tool kit” that they will need in their managerial jobs. To the extent that students may appreciate this real-world relevant and useful learning they are likely to reciprocate with higher scores in their evaluations of course teachers. Business schools also may obtain a payoff in increased real-world relevance of their graduates who have learned to develop their own situationally relevant and useful analytical and critical thinking skills.

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