

DRAFT V2: 1/7/22

ACAD – 182: Case Studies in Innovation

4 Units

Spring 2022, Mon & Wed 9:00 – 10:50 am

Location: IYH 211

**Instructor: Philip H.B. More, Ph.D., CVA
Professor Emeritus**

Office: IYH 211

**Office Hours: Mon and Wed by appointment preferably before
class 8:00- 8:30 am**

Contact Info: pmore@usc.edu I will try to reply within 24 hours

IT Help:

<https://uscedu.sharepoint.com/sites/IYASStudent/SitePages/IT-Resources.aspx>

Hours of Service: 8:30 a.m. – 6:30 p.m.

Contact Info: iya.helpdesk@usc.edu

New Software Links – Visit: <https://commerce.cashnet.com/IOVINE>

Course Description

Employing a case-study methodology, students analyze the artistic, technological, and entrepreneurial factors and address the conceptual, ethical, and logistical issues that lead to disruptive innovation.

This course is the second in a year-long sequence on technological innovation and takes the ideas generated during the first term and develops them into viable growth businesses ready for either an acquisition or an equity investment (e.g., VC, blockchain, crowd funding). The focus of the course is on using the Agile Scrum product development framework in a series of sprints to develop a business plan with financial statements based on an initial set of assumptions that are changed over time and documented with proforma financial statements. During the Agile Scrum sprints, students learn to scale-up by innovating so that they solve “jobs to be done” by customers in large addressable markets. Students also learn to develop unique and sustainable business models that offer attractive products or services that generate strong cash flow with an experienced “public company-ready” management team.

Learning Objectives

The course objectives focus on students being able to understand how to:

- **Agile Scrum:** Perform project planning in an Agile Scrum team taking on the roles of Scrum Master, Architect, Product Owner, and team member.
- **Financial Literacy:** Develop initial financial statements (balance sheets, income statements, cash flow statements), scenario planning, and proforma financial statements using QuickBooks. Be able to use the financial statements as a management information system on the organization’s fiscal health and be able to explain how individual journal entries affect change in each financial statement.
- Identify and design disruptive solutions for unmet customer needs for specific niches and then how to grow into larger markets.
- Break the process you propose using in delivering customer value down into areas where the enterprise can offer unique and sustainable value to customers that block imitation.
- Develop robust pro forma financial estimates for future funding requests that anticipate unintended contingencies for disruptive innovation.
- Develop different financial models for disruptive solutions that provide a service, a product, and or a network.
- Be able to develop a comprehensive business plan that clearly articulates your disruptive solution to satisfy a currently unmet market needs, grows beyond an initial narrow niche to a larger market, defends your solution against attempts at imitation, and details the financial risks and rewards over time to alternative outside sources of funds.
- Based on your comprehensive business plan, be able to develop and present successful pitches for outside funding for your disruptive solution.

In addition to these main learning objectives students will also engage in:

Critical thinking: Develop the awareness to identify problems and opportunities, create hypotheses, gather data through primary and secondary research sources, and draw conclusions in environments of high uncertainty.

Collaboration: Share ideas and form group work products in impromptu and organized team environments without formal structure.

Communicate effectively: Create and deliver concise, compelling oral and written presentations; convey the essence of the critical thinking process and defend conclusions rationally.

Quantitative business analysis: Link abstract ideation and innovation management theory to standard financial metrics to assess both concept viability and actual performance.

Prerequisites and/or recommended preparation

ACAD 181 Disruptive Innovation (for IYA majors) is a prerequisite.

Course Notes

As much as possible, this course should be designed as an innovative and effective workplace environment according to the same principles taught in the class. The best workplaces are learning environments. The best learning environments are both professional and *playful*.

One way or another, almost all your grade in this class is based on contribution to our collective learning. Specific participation is important, so attendance is critical. Since cases are used as the primary mode of instruction, preparation for each case is critical as is your thoughtful participation by offering your own analysis and ideas as we collectively try to build an understanding of what happened in each circumstance and what actions should be taken as a result. Except in extraordinary circumstances beyond your control, missing a case discussion and or being late when the discussion begins detracts from the collective learning of others and will be considered in your participation grade.

Most assignments in class are delivered in workplace formats (slides, memos) and linked together to support the final team project. As such, professionalism and attribution count in my feedback and grading. As much as possible, your assignments should also be aimed at your peers. Deliverables often will be shared and discussed in class and can be revised pending feedback. Every student owes constructive feedback to her or his colleagues.

Moreover, you are encouraged to share your work and leverage the work of others (inside and outside class) *if you provide credit to the source*. [Mendeley](#) is a useful document and citation manager to simplify attribution. Since using the work of others *with* attribution is encouraged, there is no justification for using the work of others without credit. [Plagiarism](#) will have serious consequences (see below).

The science is clear that connected devices diminish personal learning and distract others in the learning environment. Leave laptops, tablets, phones—and now watches—alone unless we are actively accessing information as part of class activities.

Required Materials:

Harvard Business Press (HBP) materials for both cases and financial accounting

- Purchase the course reader from the Harvard Business School Publishing: <https://hbsp.harvard.edu/import/895859> for \$131.37. To purchase you will have to register and log in. If you need assistance, contact Harvard Business School Press Help directly (1-800-545-7685 or custserv@hbsp.harvard.edu). This coursepack contains 14

cases, 2 short simulations, 2 articles, and 1 online introductory course in financial accounting.

If you have a financial hardship in purchasing the course material, please see me for referral to the appropriate office within the Academy that handles student financial aid.

Note: As a general matter, copyright infringement occurs when a copyrighted work is reproduced, distributed, performed, publicly displayed, or made into a derivative work without the permission of the copyright owner.

- Included in the price of these HBSP materials is a \$45 on-line course in Financial Accounting which you are expected to complete on your own by the 8th week of class. The course takes 10 hours of time and successful completion will result in a Certificate of Completion from Harvard University as well as a contribution to the individual portion of your total grade. The purpose of this on-line course is to help you understand the relationships between the balance sheet, income statement, and cash flow statement as an effective management information system and how a change in a journal entry affects all three. This course will also give you the necessary understanding to be able to use QuickBooks to easily generate these financial statements for your initial assumptions and for alternative scenarios for growth.

QuickBooks

- I have created a “free” QuickBooks account for your use in this course. During the first few sessions, you will receive an email link from Intuit (the QuickBooks publisher) to set up a free account for use during the course.
- You can find publicly available tutorials for QuickBooks by going to: <https://quickbooks.intuit.com/learn-support/>
In addition to Intuit (creator of QuickBooks) training, additional help for setting up and using QuickBooks online can be found in <https://www.youtube.com/> videos.
- If you would like to receive QuickBooks Certification, please go to: <https://www.certipoint.com/Portal/SSL/Login.aspx?ReturnUrl=/Portal/desktopdefault.aspx?tabid=668&roleid=101> Additional fees for this certification may apply.

Description and Assessment of Assignments

All assignments are graded by me. I will attempt to return grades and comments to you as quickly as I can but no later than one week after the assignment has been turned in. My grades of your work and constructive feedback to you will be posted directly to you through the Bb system.

An outline with the required readings or viewing (if a video) along with discussion questions to prepare will be posted in Bb for each class session. When written assignments are due, a grading rubric will also be provided.

Grading Breakdown

| | | | |
|-------------------------------------|------------|-------|-------|
| Agile Scrum Roles | Individual | 10.0% | |
| Personal Reflection | Individual | 10.0% | |
| Peer Evaluation | Individual | 5.0% | |
| HBP Financial Accounting Completion | Individual | 10.0% | |
| QuickBooks Completion | Individual | 5.0% | |
| Case discussion | Individual | 10.0% | |
| Agile Scrum Backlog cleared | Team | | 5.0% |
| Business plan | Team | | 20.0% |
| Financial statements & scenarios | Team | | 25.0% |

Grading Scale (Example)

Course final grades will be determined using the following scale

| | | | |
|----|--------|----|--------------|
| A | 95-100 | C | 73-76 |
| A- | 90-94 | C- | 70-72 |
| B+ | 87-89 | D+ | 67-69 |
| B | 83-86 | D | 63-66 |
| B- | 80-82 | D- | 60-62 |
| C+ | 77-79 | F | 59 and below |

Assignment Submission Policy

Unless otherwise indicated, assignments are to be submitted in pdf format—*with individual and team names included in the document and file name*. Assignments will be due by email. Earning an A or A- in this class means that you went well beyond the minimum requirements for assignments, participation, etc. There is no hard curve for this course.

You will work in Agile Scrum teams and as such you will organize your work during each sprint to meet the deliverable deadline. Learning to meet deadlines is a critical indicator of your future success and needs to be learned early in your educational career. Turning in assignments early is allowed, turning in assignments late is not and will result in a grading penalty of -10% for every hour late. Deadlines by time (if other than COB) and date are listed in the Course Schedule below. Close of Business (COB) is 6:00 p.m. If an assignment cannot be completed by its due date, a detailed explanation for when it will be delivered must be delivered in its place and the assignment is added to the team's backlog which must be cleared by the end of the term.

Note: Given the uncertainty created by the COVID-19 pandemic I am including information on how we will handle remote learning if we need it.

Spring 2022 addendum:

- Unless students provide an accommodation letter from USC's Office of Student Accessibility Services or a letter from IYA Student Services detailing visa or travel restrictions, attendance and active participation is expected in the classroom. Any student with such accommodations should submit their accommodation document to the instructor as soon as possible to discuss appropriate

accommodations. Either classroom recordings or live remote access to the class via Zoom will be provided.

- Students who are experiencing illness should not attend class in person. Please inform the instructor in advance of any class sessions that you can't attend for medical reasons, and accommodations will be arranged to view recorded lectures and submit alternatives to any missed class participation. Students will not be penalized for not attending class in person under these circumstances.
- If you find yourself experiencing COVID-19 related symptoms, in keeping with university recommendations, you should Stay home! This is the best way to prevent spreading COVID-19 as supported by scientific evidence; Please do not come to an in-person class if you are feeling ill, particularly if you are experiencing symptoms of COVID-19.

Case Discussion Feedback:

Synchronous students: Feedback on your peer's contribution to your learning in the case discussion are due NLT 72 hours after the end of the discussion (e.g., Monday case discussion feedback due NLT noon (LA time) Wednesday. If it is Wednesday case discussion feedback is due NLT noon (LA time) Friday. Once the feedback from the asynchronous students is received and sent to you, you will have 48 hours to evaluate their contribution in an email to me to the same case.

Asynchronous students: Your feedback on the synchronous student's case discussion is due back to the instructor by email within 48 hours of the original discussion so that your comments can be sent out for synchronous students for their evaluation of your contribution to the same case.

See the "Lemonade Stand Agile Scrum Team Assignment" attachment for more information.

Grading Timeline

Grading and feedback will be returned in a timely manner, usually within one week, and you are encouraged to meet with me to discuss any aspect of an assignment.

Academy Attendance Policy

The Academy maintains rigorous academic standards for its students and on-time attendance at all class meetings is expected. Each student is expected to be in attendance as required by their Section assignment. Because of the Covid-19 restrictions, we will start the class online but if sometime during the term the Academy is allowed to shift to a hybrid format the class will be divided into three sections as follows: Section A, B, and C.

- Section A will include approximately 50% of those students who are on-campus and will physically meet f2f on Tuesdays. Section A students will meet online on Thursdays.
- Section B will include the remaining 50% of those students who are on-campus and will physically meet f2f on Thursdays and online on Tuesdays.
- Section C will include those students who are not able to be on-campus due to circumstances previously authorized by the University

(e.g., prevented from entering the U.S. or Los Angeles due to official government or University actions such as visa denials. Section C students will attend all sections online synchronously (the same time) as the other sections. Exceptions to the Section C synchronous requirement may be granted in exceptional circumstances after consultation with the IYA administration and Instructor.

Each student will be allowed two excused absences over the course of the semester for which no explanation is required. Students are advised to not waste excused absences on non-critical issues, and to use them carefully for illness or other issues that may arise unexpectedly. Except in the case of prolonged illness or other genuine issue (see below), no additional absences will be excused. Each unexcused absence will result in the lowering of the final grade by $\frac{1}{3}$ of a grade (e.g., an A will be lowered to A-, and A- will be lowered to a B+, etc.). In addition, being tardy to class will count as one-third of an absence. Three tardies will equal a full course absence.

Students remain responsible for any missed work from excused or unexcused absences. Immediately following an absence, students should contact the instructor to obtain missed assignments or lecture notes and to confirm new deadlines or due dates. Extensions or other accommodations are at the discretion of the instructor.

Automatically excused absences normally may not be used for quiz, exam, or presentation days. Using an excused absence for a quiz, exam, or presentation, such as in the case of sudden illness or other emergency, is at the discretion of the instructor.

In the case of prolonged illness, family emergencies, or other unforeseen serious issues, the student should contact the instructor to arrange for accommodation. Accommodation may also be made for essential professional or career-related events or opportunities. All accommodations remain at the discretion of the instructor, and appropriate documentation may be required.

[USC Technology Support Links](#)

[Zoom Information for students](#) [Bb help for students](#) [Software available to USC Campus](#)

Zoom etiquette

Asynchronous Considerations

- Please try and follow the USC suggested discussion norms listed below under the headings of respect, constructiveness, and Inclusivity.
- Written communication should be in accordance with professional standards written clearly and succinctly. We will discuss professional business communication standards in class.
- Please sign your name to each post and reply.
- Try and avoid chat acronyms, emoticons, etc. in your postings and replies.
- Follow USC policy regarding material and communication posted within Bb (see below).
- Please contact me by email If you encounter any problems or conflict in the asynchronous environment.

Synchronous Considerations

- You should come to class as you would in a professional Zoom meeting with an employer.
- Log-in to the class using Bb and or Zoom not your phone.
- If you have technical issues during the class, please let me know in the chat. If there is a TA, they will try and resolve your problem and if not, you should contact iyhelp@usc.edu, 213-821- 6917 directly.
- Please mute your microphones when you are not speaking.
- Please enable your webcam, so you are visible in the course.
- Please feel free to make use of the chat box during the session.
- When you have something to add, please raise your hand so that I can see it in the video or use the electronic hand.
- Please contact me by email If you encounter any problems or conflict in synchronous environment.

Respect

- Listen actively and attentively.
 - Listen respectfully, without interrupting.
 - Comments that you make (asking for clarification, sharing critiques, expanding on a point, etc.) should reflect that you have paid attention to the speaker's comments.
 - Listen carefully to what others are saying.
 - Listen carefully to what others are saying even when you disagree with what is being said.
- Respect each other's views.
 - Challenge one another but do so respectfully.
 - Be respectful of what others are saying.
- Always use a respectful tone.
 - Avoid inflammatory language.
 - Avoid put-downs (even humorous ones).
 - No name-calling or other character attacks.
 - No interrupting or yelling.
 - Do not interrupt when someone else is speaking.
 - Know tone of voice and body language are powerful communicators. Some postures or facial expressions (e.g., crossed arms, eye rolls, loud sighs) can silence, provoke, intimidate, or hurt others. Others (e.g., facing and looking at the speaker, staying quiet, nodding) can show you are listening respectfully
 - Refrain from responding to others' statements by applause, groans, or other noise.
 - Signal agreement with another student's statement by silent applause.
 - Make eye contact with other students and refer to classmates by name.
- Make no assumptions about others
 - Trust that people are always doing the best they can.

Respect

- Be courteous. Don't interrupt or engage in private conversations while others are speaking.
 - Don't be incredulous.
 - Don't roll your eyes, make faces, laugh at a participant, etc., especially to others on the side.
 - Don't start side conversations parallel to the main discussion.
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- Only make statements about an issue, person, or group if you are prepared to make the statement directly and respectfully to a person to whom the issue is important.
 - Don't present objections as flat dismissals (leave open the possibility that there's a response).
 - Only say what you truly believe.

Constructiveness

- Criticize ideas, not individuals or groups.
 - Focus on ideas, not personalities.
 - Respect others' rights to hold opinions and beliefs that differ from your own.
 - If we wish to challenge something that has been said, we will challenge the idea or the practice referred to, not the individual sharing this idea or practice.
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- Commit to learning, not debating.
 - Build on one another's comments; work toward shared understanding.
 - Objections are fine, but it's also always OK to be constructive, building on a speaker's statement or strengthening their position. Even objections can often be cast in a constructive way.
 - Think before you speak.
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- Link claims and assertions to appropriate evidence whenever possible.
 - Either support statements with evidence or speak from personal experience.
 - Do not offer opinions without supporting evidence.
 - Refer to the text to support your ideas.
 - Support your statements. Use evidence and provide a rationale for your points.

Constructiveness

- Ask questions when you do not understand; do not assume you know what others are thinking.
 - Ask for clarification if you are confused.
 - Ask clarifying questions if you do not understand a point raised.
 - Ask a question to explore areas of uncertainty or discomfort.
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- Try to see the issue from the other person's perspective before stating your opinion.
 - Consider the difference between responding to express yourself and responding to get an idea across to people who have different preconceptions than yours.
 - Always have your book/readings in front of you.
 - Build on your classmates' comments. Acknowledge them, even if you disagree with them.
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- Speak from your own experience, without generalizing.
 - Use "I" statements to state your views. For example, "I notice that when I'm with my friends we pay attention differently" is more constructive than "When you're with friends you pay attention differently."
 - Share briefly from your own experiences when appropriate, rather than simply your positions.
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- Be careful not to generalize about people.
 - Avoid blame and speculation.
 - Respond to what is said in class, without attributing motivation to the speaker (this can be very challenging).

Inclusivity

- Let other people speak. Once you are done speaking, let at least two other people talk before you speak again.
 - Don't dominate the discussion.
 - Try not to let your question (or your answer) run on.
 - Do not monopolize discussion.
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- Know that it is okay to be emotional about issues and to name those emotions.
 - It's OK to ask a question that you think may be unsophisticated or uninformed.
 - Don't worry about impressing people.

Inclusivity

- Try not to silence yourself out of concern for what others will think about what you say.
- Don't use unnecessarily offensive examples.
- If you are offended by anything said during discussion, acknowledge it immediately.
- If you are offended by something or think someone else might be, speak up and don't leave it for someone else to have to respond to it.
- Consider anything that is said in class strictly confidential. We want to create an atmosphere for open, honest exchange.
- Maintain confidentiality (what is said in the classroom stays in the classroom.)
- Keep confidential any personal information that comes up in class.
- Do not remain silent. Make sure to contribute to the discussion.
- Step Up, Step Back. Be mindful of taking up much more time than others. On the same note, empower yourself to speak up when others are dominating the conversation.
- Everyone in the group should participate in the conversation.
- Allow everyone the chance to talk. If you have much to say, try to hold back a bit; if you are hesitant to speak, look for opportunities to contribute to the discussion.
- If you think something is missing from the conversation, don't wait for someone else to say it; say it yourself.
- Acknowledge points made by previous questioners.
- Support good ideas that other people have, even if they are different from your own.
- Take responsibility for the quality of the discussion.
- We will not demean, devalue, or "put down" people for their experiences, lack of experiences, or difference in interpretation of those experiences.
- Recognize and/or remember that we have different backgrounds.
- Consider who gets left out, who is marginalized, under-represented, or erased by claims. So, for example, we could say, "That's an image of an ideal family," or we could say, "That may be an image of an ideal family for many middle-class white heterosexuals."
- Be careful about putting other students on the spot. Do not demand that others speak for a group that you perceive them to represent.

Inclusivity

- Be aware of different communication styles--the ways we communicate differently based on our backgrounds and current contexts--and look for ways to expand your communication tool kits.
- Our primary commitment is to learn from each other. We will listen to each other and not talk at each other. We acknowledge differences amongst us in backgrounds, skills, interests, and values. We realize that it is these very differences that will increase our awareness and understanding through this process.

Procedure

- Wait to be recognized by the instructor or discussion leader before speaking.
- Stand and face most of the class before speaking.
- State your name before making your statement, so other students can reference your statement properly.
- If responding or reacting to a statement by another student, indicate by name the student whom you are referencing.
- Make a single point each time you speak, rather than making a series of statements at once.
- Start your statement with a short one-sentence summary of the point you are making.

Please contact me with questions or concerns about complying with a policy. For instance, if you are unable to keep their camera on during the synchronous Zoom session, contact me prior to the class session to discuss expectations and accommodations needed.

Synchronous session recording notice

The synchronous sessions will be recorded and provided to all students asynchronously.

Sharing of course materials outside of the learning environment

USC has a policy that prohibits sharing of any synchronous and asynchronous course content outside of classroom learning environment.

SCampus Section 11.12(B)

Distribution or use of notes or recordings based on university classes or lectures without the express permission of the instructor for purposes other than individual or group study is a violation of the USC Student Conduct Code. This includes, but is not limited to, providing materials for distribution by services publishing class notes. This restriction on unauthorized use also applies to all information, which had been distributed to students or in any way had been displayed for use in relationship to the class, whether obtained in class, via email, on the Internet or via any other media. (See Section C.1 Class Notes Policy).

Residential and Hybrid Streaming Model Courses

When we move from online to a hybrid model, you can consult the latest COVID-19 testing and health protocol requirements for on campus courses. Continuously updated requirements can be found on the [USC COVID-19 resource center website](#).

BREAKS - NO CLASS

Cases

Assignments

Course Schedule: A Weekly Breakdown – All Classes will be online accessed through the Zoom link within Blackboard beginning January 10, 2022, until further notice.

Subject to change pending guest speakers, etc.

| | Monday -on Zoom | Wednesday – on Zoom | Deliverables |
|---------------------------------------|--|---|---|
| Week 1 M-Jan 10 W-Jan 12 | What do we know? Overview course, business plan with financial statements, Agile Scrum Organization. Choose Scrum roles for term and lecture on how to develop a project plan. Scrum Master #1 (SM1) report in class on status from JTBD surveys of 3 alternatives for unmet customer needs. | Sprint 1: Finding Unmet Customer Needs. SM1 leads team on finalizing JTBD survey results on unmet customer needs for 3 possible directions and develops MVP1 to test hypotheses for each of 3 directions. See Bb Session posts for MVP process references. SM1 leads team in preparing Mighty Jaxx case | 1/14 COB SM1 Submits weekly team report (includes meetings, attendees, progress on assignments, difficulties) + team project plan for term. |
| Week 2 M-Jan 17 W-Jan 19 | Martin Luther King Day: NO CLASS | Discuss Mighty Jaxx case. SM1 leads team in developing norms, behaviors, and transparency and leads team in finalizing 3 MVP1 launches by 1/26/22. | 1/23 Not Later Than (NLT) Midnight SM1 sends slide deck of report presented tomorrow (1/24). |
| Week 3 M Jan 24 W Jan 26 | Teams report evidence of unserved customer needs for each of 3 possible directions and the hypotheses being tested in each of 3 MVP1 to be launched. Review material Value Proposition Canvas and creating product-market fit. SM1 Leads team in preparing Zipline case. | Discuss Zipline case. SM1 leads team in working on MVP1 for 3 directions as well as preparing norms, behaviors, QuickBooks financial statements signups, and backlog. | 1/28 COB SM1 sends email weekly team report (see above) + confirms team launched MVP1 for each of 3 directions. SM1 also sends report of team activities with norms, behaviors, QuickBooks financial statement signups, and backlog. |
| Week 4 M Jan 31 W Feb 2 | Sprint 2: Competitive Advantage. Reorg new roles. In-class individually play the “ Strategy Simulation: Value Champion ” and then debrief. Finally, | Discussion of Birchbox case. SM2 leads developing business model for 3 possible projects with initial financials from QuickBooks. | 2/4. COB SM2 emails weekly team report + report with norms, behaviors, business |

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| | SM2 leads team in preparing the Birchbox case. | Finalize 3 MVP2 for release by COB 2/4. | model, and initial financial statements. |
| Week 5 M Feb 7 W Feb 9 | SM2 leads preparation of Mobileye case and continued work on the Lemonade Stand project. | Mobileye case discussion and continued work on Lemonade Stand project, and preparation of Parts 1 and 2 for the Business Plan. | 2/11 COB SM2 sends email of weekly team report + confirms team launched MVP2 for each of 2-3 directions. In addition, SM2 submits Parts 1 and 2 from the Business Plan (see outline from Session 1). |
| Week 6 M Feb 14 W Feb 16 | Sprint 3: Jumping the Chasm & Inside the Tornado Reorg new roles. Play Innovation Marketing Simulation: Crossing the Chasm (30 minutes individual). Debrief simulation and then Scrum Master 3 (SM3) leads team in working on the Lemonade Stand project. | SM3 leads team in preparing OnePlus and using the MVP2 feedback to revise and test new hypotheses for 2-3 products in MVP3 launch next week. | 2/18 COB SM3 sends emails weekly team report + report on team member's progress on completing the HBS Financial Accounting Course, and QuickBooks. |
| Week 7 M Feb 21 W Feb 23 | PRESIDENTS DAY: NO CLASS. | OnePlus case discussion. Discussion of Inside the Tornado and continue work on Lemonade Stand project and finalize MVP3 hypotheses tests prior to launch by end of the week. (1) Geoffrey Moore - The Chasm Has Evolved - Bing video | 2/25 COB SM3 emails weekly team report + confirms MVP3 launch for each of 1-2 directions and progress by each team member on the HBS Financial Accounting course. |
| Week 8 M Feb 28 W Mar 2 HBS COURSE COMPLETED | SM3 leads team in preparing Zoom (A) & (B) cases and then works on the Lemonade Stand project. | Zoom (A) & (B) cases discussion then work on Lemonade Stand project by analyzing the MVP3 results from the 1-2 directions and picks the most promising single direction. | 3/4 COB each individual emails HBS Certification of Completion for Financial Accounting Course. SM3 emails weekly team report + Part 3 (Product or Service) from Business Plan (see outline from Session 1). |
| Week 9 M Mar 7 W Mar 9 | Sprint 4: Growth (Internal) Reorg new roles. Scrum Master 4 (SM4) leads team in preparing for Starbucks case. | Case Discussion of Starbucks case. QuickBooks output into Excel and scenario model workshop. SM4 leads team in creating 3 scenarios from new assumptions. | 3/11 COB SM4 emails weekly team report + descriptions of 3 scenarios (Maximum Likelihood (ML) growth, 10% greater growth than ML, and 10% less growth than ML) for each product/service project direction for use |

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| | | | in financial contingency plan later in term. |
| Week 10 M Mar 14 M Mar 16 | SPRING BREAK | SPRING BREAK | |
| Week 11 M Mar 21 W Mar 23 | Sprint 4: Growth (M&A). SM4 leads team in preparing Amazon Fresh case and Lemonade Stand business plan and financial statements | Case discussion of Amazon Fresh . SM5 leads team in updating business plan and financial statements using growth thru diversification ideas. | 3/25 COB SM4 emails weekly team report + Parts 4, 5, and 6 of Business Plan - Marketing & Sales (see outline from Session 1). |
| Week 12 M Mar 28 W Mar 30 | Sprint 5: Platform Industries. Reorg new roles. Lecture on platform industries and discussion of discrimination reading. SM5 leads team in preparing for ZBJ case and reading on Why Some Platforms Thrive and Others Don't and leads discussion on implementing platform principles for Lemonade Stand project. | Discuss ZBJ case. SM5 leads team in discussion of reading Fixing Discrimination in Online Marketplaces and then implementing principles from platform industries without discrimination into Lemonade Stand project. | 4/1 COB SM5 emails weekly team report + report of using any of the growth principles (e.g., internal, M&A, platform) to aid business growth with adjustments to the scenarios and likely financial impacts together with any revised sections to the team's evolving Business Plan. |
| Week 13 M Apr 4 W Apr 6 | SM5 leads team in preparing the " Online Marketplace Investment " case. finalizing business plan and financials | Discuss " Online Marketplace Investment " case. Continue working on Lemonade Stand project. | 4/8 COB SM5 emails weekly report + financial contingency model using updated scenarios with their financial implications in the business plan and submits Parts 7, 8, 9 on Funding from the Business Plan (See outline from Session 1). |
| Week 14 M Apr 11 W Apr 13 | Sprint 6: Funding (Sources of funds and issues). Reorg new roles. SM6 leads team in preparing Yuser case | Discuss the Yuser case and then discuss within your team the most appropriate legal form for your organization and the best alternative for outside funding. The results of this discussion will be emailed by SM6 by COB Friday. | 4/15 COB SM6 emails weekly team report + results of team discussion on appropriate use/non-use of token issuance, crowd funding, VC, or debt as method for project funding. |
| Week 15 M Apr 18 W Apr 20 | SM6 leads team in preparing for Snap IPO . Discussion of Lyft IPO reading. | Discuss Snap IPO case. SM6 leads preparation of cases. | 4/22 COB Each individual submits both Peer Evals and Individual Reflection. |

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| Week 16 M Apr 25 W Apr 27 | Discussion of Women Entrepreneur case. | LAST DAY of Class. Summary of course and student evaluation. | 4/29 COB SM6 emails completed Business Plan including revised earlier sections, appendices, and final format (see Session 1). |
| FINAL | Friday, May 6 8-10 a.m. Final presentation of Lemonade Stand project for outside funding (IPO, crowd, bitcoin). | | 5/6 8-10 a.m. SM6 leads team in Final Presentation and insures that slide deck is emailed NLT midnight Thursday, May 5 th . |

Statement on Academic Conduct and Support Systems

Academic Conduct

Plagiarism – presenting someone else’s ideas as your own, either verbatim or recast in your own words – is a serious academic offense with serious consequences. Please familiarize yourself with the discussion of plagiarism in *SCampus* in Part B, Section 11, “Behavior Violating University Standards” <https://policy.usc.edu/student/scampus/part-b>. Other forms of academic dishonesty are equally unacceptable. See additional information in *SCampus* and university policies on scientific misconduct, <http://policy.usc.edu/scientific-misconduct>.

Discrimination, sexual assault, intimate partner violence, stalking, and harassment are prohibited by the university. You are encouraged to report all incidents to the *Office of Equity and Diversity/Title IX Office* <http://equity.usc.edu> and/or to the *Department of Public Safety* <http://dps.usc.edu>. This is important for the health and safety of the whole USC community. Faculty and staff must report any information regarding an incident to the Title IX Coordinator who will provide outreach and information to the affected party. The sexual assault resource center webpage <http://sarc.usc.edu> fully describes reporting options. Relationship and Sexual Violence Services <https://engemannshc.usc.edu/rsvp> provides 24/7 confidential support.

Support Systems: A number of USC’s schools provide support for students who need help with scholarly writing. Check with your advisor or program staff to find out more. Students whose primary language is not English should check with the *American Language Institute* <http://ali.usc.edu>, which sponsors courses and workshops specifically for international graduate students. *The Office of Disability Services and Programs* <http://dsp.usc.edu> provides certification for students with disabilities and helps arrange the relevant accommodations. If an officially declared emergency makes travel to campus infeasible, *USC Emergency Information* <http://emergency.usc.edu> will provide safety and other updates, including ways in which instruction will be continued by means of Blackboard, teleconferencing, and other technology.

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Support Systems:

Student Health Counseling Services - (213) 740-7711 – 24/7 on call

engemannshc.usc.edu/counseling

Free and confidential mental health treatment for students, including short-term psychotherapy, group counseling, stress fitness workshops, and crisis intervention.

National Suicide Prevention Lifeline - 1 (800) 273-8255 – 24/7 on call

suicidepreventionlifeline.org

Free and confidential emotional support to people in suicidal crisis or emotional distress 24 hours a day, 7 days a week.

Relationship and Sexual Violence Prevention Services (RSVP)

213-740-9355 (WELL)

<https://studenthealth.usc.edu/sexual-assault/>

Free and confidential therapy services, workshops, and training for situations related to gender-based harm.

Relationship and Sexual Violence Prevention and Services provides immediate therapy services for situations related to gender- and power-based harm (e.g., sexual assault, domestic violence, stalking).

Office of Equity and Diversity (OED) | Title IX - (213) 740-5086

equity.usc.edu, titleix.usc.edu

Information about how to get help or help a survivor of harassment or discrimination, rights of protected classes, reporting options, and additional resources for students, faculty, staff, visitors, and applicants. The university prohibits discrimination or harassment based on the following protected characteristics: race, color, national origin, ancestry, religion, sex, gender, gender identity, gender expression, sexual orientation, age, physical disability, medical condition, mental disability, marital status, pregnancy, veteran status, genetic information, and any other characteristic which may be specified in applicable laws and governmental regulations.

USC Policy Reporting to Title IX (213) 740-5086

<https://policy.usc.edu/reporting-to-title-ix-student-misconduct/>

The university encourages individuals to report prohibited conduct to the *Title IX Office*. Individuals can report to the university *Title IX Coordinator* in the *Office of Equity and Diversity*.

Bias Assessment Response and Support - (213) 740-2421

studentaffairs.usc.edu/bias-assessment-response-support

Avenue to report incidents of bias, hate crimes, and microaggressions for appropriate investigation and response.

The Office of Disability Services and Programs - (213) 740-0776

dsp.usc.edu

Support and accommodations for students with disabilities. Services include assistance in providing readers/notetakers/interpreters, special accommodations for test taking needs, assistance with architectural barriers, assistive technology, and support for individual needs.

USC Support and Advocacy - (213) 821-4710

studentaffairs.usc.edu/ssa

Assists students and families in resolving complex personal, financial, and academic issues adversely affecting their success as a student.

Diversity at USC - (213) 740-2101

diversity.usc.edu

Information on events, programs and training, the Provost's Diversity and Inclusion Council, Diversity Liaisons for each academic school, chronology, participation, and various resources for students.

USC Emergency - UPC: (213) 740-4321, HSC: (323) 442-1000 – 24/7 on call

dps.usc.edu, emergency.usc.edu

Emergency assistance and avenue to report a crime. Latest updates regarding safety, including ways in which instruction will be continued if an officially declared emergency makes travel to campus infeasible.

USC Department of Public Safety - UPC: (213) 740-6000, HSC: (323) 442-120 – 24/7 on call dps.usc.edu

Non-emergency assistance or information.

Lemonade Stand Agile Scrum Team Assignments

Agile project management is an iterative approach for planning and guiding project processes. There are several versions of the Agile approach. We'll use the most popular form of Agile known as Scrum so it's important for you to know the difference. Watch the following short video to learn the difference between Agile and Scrum.

https://www.youtube.com/watch?v=Bmikq_Opft8

Agile Scrum teams are cross-functional, self-organizing teams that are collectively responsible for achieving their goals. It is the responsibility of every team member to be responsible to each other team member for working collaboratively with transparency, inspection, and adaption (<https://luis-goncalves.com/scrum-pillars/>).

Watch the video below and designate the various roles described within your team. Rotate the roles so that everyone in the team has experience in each role at least once by the end of the term. You are responsible for setting up an assignment sheet that lists each role for each person in your team for each of the first six sprints over the term. Each sprint is assigned for about two weeks (12 weeks total). The first three sprints are for finalizing your product/process design and the last three sprints are for moving out from your niche, growing, and obtaining outside funding. Each week the Scrum Master makes a progress report plus any additional information needed by the Product Owner (the instructor) to monitor Sprint progress. After each sprint there is a report out by each team member to their team and a summary by the Scrum Master to the class.

<https://www.youtube.com/watch?v=aQrsVfjbQZ4>

At the beginning of the term, in addition to setting up your various roles within the team for the first six sprints, please spend time preparing norms and expectations. Watch the following video to help with your list of team norms.

<https://www.agileconnection.com/article/creating-team-norms>

You will become more familiar with the Agile Scrum framework over the course of the term but to help you get an early understanding of how they work, the following video may help by showing a simulated Scrum team in action:

https://www.youtube.com/watch?v=hgn_oNmftgq

Assignments for you to organize and complete within your Scrum team (others may be added throughout the term)

- Create an Agile Scrum team and designate the various roles: Scrum Master, Architect, Team Members. The instructor will play the role of Product Owner for all teams. Ensure that the workload is balanced and avoids conflicts with your other classes assignments.
- Everyone needs to have their own personal copy of all course materials (see syllabus for list).
- Everyone completes the online Financial Accounting course by the end of the 8th week.
- Everyone needs to have a free QuickBooks account.
- Everyone needs to be able to access and use QuickBooks for all the required assignments throughout the course including preparation of all the financial statements.
- Each team needs to turn-in a report at the end of each sprint on their workorder "backlog" and their "to do" list together with any assignments during the sprint.
- Each team needs to rotate the various roles of Scrum Master, Architect, team member over the first six sprints.