

USC Marshall School of Business

BUAD 497: Strategic Management (4 units)

Syllabus – Fall 2024

Sections: 15100; T TH 8:00 – 9:20 AM; JFF 240
15102; T TH 10:00 – 11:20 AM; JFF 240

Instructor: John Eklund

Office: HOH 522

Office Hours: By appointment
Conducted in person or on Zoom.

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Course Description

This course introduces the key concepts, tools, and principles of strategy formulation and competitive advantage. It is concerned with managerial decisions and actions that affect the performance and survival of business enterprises. The course is focused on the information, analyses, skills and business judgment managers must use to craft strategies to maximize long-term profits in the face of uncertainty and competition.

Strategic Management (BUAD 497) is an integrative and interdisciplinary course. It assumes a broad view of the environment that includes suppliers, buyers, competitors, the economy, technology, capital markets, the government and global forces and views the external environment as dynamic and characterized by uncertainty. The course draws together and builds on the ideas, concepts, and theories from your functional courses such as economics, accounting, finance, marketing and statistics.

The course takes a *general management* perspective, viewing the firm as a whole, and examining how policies in each functional area are integrated into an overall competitive strategy. The key strategic business decisions of concern in this course include selecting competitive strategies, creating and sustaining competitive advantages, defining firm boundaries and allocating critical resources over long periods of time. Decisions such as these can only be made effectively by viewing a firm *holistically*, and over the long term.

Prerequisites. The course prerequisites, as listed in the USC catalogue, are as follows: 1 from ([ACCT 410](#) or [BUAD 281](#) or [BUAD 305](#)) and [BUAD 304](#) and [BUAD 307](#) and 1 from ([BUAD 310](#) or [BUAD 312](#) or [EE 364](#) or [MATH 407](#)) and 1 from ([BUAD 351](#) or [ECON 351](#)) and 1 from ([BUAD 352](#) or [ECON 352](#))

Learning Objectives

Theory and Concepts. BUAD 497 provides the key concepts, tools, and principles of strategy formulation and competitive advantage. The course covers theories and frameworks for in-depth industry and competitor analysis, for analyzing the impact of various forces (e.g. technological advances, government regulation) on industry competition and evolution and for anticipating and predicting future industry developments. The course also examines the economic underpinnings of competitive advantages and the fundamental conditions that allow firms to create and sustain advantageous strategic positions. The course also covers concepts and theories for corporate strategy decisions such as diversification and vertical integration as well as theories and frameworks for global strategy decisions.

Analytical Skills. Theoretical concepts are a great aid to understanding, but by themselves are not enough to solve real business problems. You also need a set of useful analytical tools and skills that can be applied to the data to question and validate the facts and the premises assumed in the theories. Some of the tools are quantitative e.g. analyzing financial statements or calculating the effect of scale on production costs, while others are qualitative. Learning how and when to apply these techniques is a key objective of the course.

The course will offer you experience in conducting a comprehensive strategic analysis of a company. This involves an in-depth external analysis of the firm's industry and competitors and a thorough internal analysis of the firm's objectives, strategies, competitive advantages and performance. You will also identify and analyze the key strategic problems faced by the company and develop effective solutions and an implementation plan.

Critical Thinking Skills. The course will place a special emphasis on developing your critical thinking skills and enhancing your ability to present a thoughtful critique of others' arguments, analyses and supporting evidence. These skills will also help you to gather information, prepare thoughtful analyses and build compelling arguments.

Communication Skills. The best analysis will have little effect if it cannot be communicated to others. Managers must be able to articulate their views coherently and persuasively. Management is a "verbal sport". As much as ninety percent of a typical manager's day can be consumed by communication. Time is often scarce. You must learn to make convincing arguments and to make them quickly. This skill takes practice and we will place a special emphasis on it in class through oral presentations and written reports.

Heuristics. Much of the knowledge that successful managers use consists of "rules of thumb" about what issues are likely to be important in certain kinds of business situations and about how best to deal with certain problems. These rules of thumb or heuristics are often implicit in managers' thinking yet they have never bothered to articulate them explicitly. An important goal of this course is to help you build up your set of useful rules of thumb or heuristics for your future managerial careers.

In this course, we are as much interested in developing an appreciation for the *art* of management as we are in understanding the *science* of management. Tools alone may make you a good analyst, but they will not make you a good strategist. While the ability to master analytical tools and frameworks is essential, ultimate success is more strongly predicated on vision, insight, good judgment and a willingness to act with conviction.

Upon successful completion of the course, students will have the knowledge and skills to:

1. Explain the fundamental characteristics of a well-conceived strategy and formulate an effective strategy for competitive advantage.
2. Analyze the main structural features of an industry and recommend a strategy that positions a company most favorably in relation to competition.
3. Explain the characteristics of disruptive innovations and recommend a strategy to develop disruptive innovations for competitive advantage.
4. Appraise the resources and capabilities of a firm and explain how they can be leveraged to earn above-average returns.
5. Diagnose a firm's competitive advantage and provide recommendations for creating, enhancing, and sustaining competitive advantages.
6. Analyze the dynamics in competitive rivalry and develop strategies for acting both proactively and defensively.
7. Conduct basic game-theoretic analysis to predict competitive interactions.
8. Describe a firm's corporate strategy, evaluate its effectiveness and recommend vertical and horizontal changes in the boundary of the firm.
9. Describe a firm's global strategy, evaluate its effectiveness and provide recommendations to enhance performance on a global level.

10. Recognize ethical challenges in business situations and develop effective recommendations for addressing them.
11. Explain the concept of shared value and provide recommendations for creating shared value.
12. Perform a comprehensive strategic analysis of a company, analyzing the key strategic problems it faces and providing effective solutions and an implementation plan.
13. Provide a thoughtful critique of others' arguments, analyses and supporting evidence.
14. Communicate your arguments coherently and persuasively.

Course Materials

Required course materials

Harvard Coursepack. Assigned readings and cases for this course are compiled in a digital coursepack available from Harvard Business School Publishing at the following link:

<https://hbsp.harvard.edu/import/1200570>

Additional readings may be distributed in class or posted to Brightspace. The final exam will typically include an additional case which will need to be purchased individually.

Brightspace. Brightspace will be the central platform we use for this class. I will post various course materials to Brightspace including the course syllabus, PowerPoints, lecture notes, case discussion questions and assignments. Please check Brightspace regularly for any new information or materials relevant to upcoming sessions.

Optional course materials

There is **no** required textbook for this course. The only required materials are the cases and readings in the Harvard coursepack. Some students have found that a textbook helps them cement their understanding of the basic concepts of the course. For further reading, I recommend the following optional textbook: Frank Rothaermel, *Strategic Management*, 4th Edition, McGraw-Hill Education, 2018. It is a good textbook that elaborates on many of the concepts discussed in the course.

Course Format

In-Person Class w/ asynchronous material. Class will meet in-person, as was the norm prior to the pandemic. Access to technology and a reliable internet connection will help you excel in the course. Students with technology or internet needs should communicate those needs with the following sources:

- [Marshall Emergency Funding Resources](#)
- [USC Resources; basicneeds@usc.edu](mailto:basicneeds@usc.edu)

BUAD 497 is a 4-unit course and is listed in the course schedule for 110 minutes. The 110 minutes will be split between in-person class sessions and asynchronous material. In-person class sessions will typically run for approximately 80 minutes, although some sessions will run longer. Asynchronous material (videos lectures recorded by USC faculty) will be posted on the course website. Students will be responsible for viewing these videos. When in-person class sessions end at 80 minutes, students will be able to utilize the remaining 30 minutes for group work and/or meeting with faculty instructors.

Classroom Policies

- Active class participation is important in achieving the learning objectives for this course. Unless students provide an accommodation letter from USC OSAS or from Marshall 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 their instructor as soon as possible. Your instructor will then provide regular access to a recording of the class and an opportunity to regularly make up missed in-class participation.

- Students who are experiencing illness should not attend class in person. Please inform the instructor in advance of the class session to discuss what accommodation will be made to allow for the make-up of missed class work and missed in-class participation. Students will not be penalized for not attending class in person under these circumstances.

Case Method. In order to achieve the objectives of the course, we will devote the majority of our class time to the analysis and discussion of selected business cases. Occasional lectures will be given to elaborate on key theoretical concepts and frameworks. These lectures, however, will be subordinate to the case analysis. Cases provide a natural "test-bed" for theory and provide vivid examples that aid the memory of concepts. While nothing can surpass first-hand personal industry and managerial experience as a basis for decision-making, case analysis is an indispensable proxy for the kind of knowledge that can only be gained through years of experience and research. A set of business cases has been selected on a range of companies from a variety of industry settings. Each case is intended to teach us something specific, yet each can teach us many things. We will not attempt to exhaust each case of all its learning experiences, but rather build up a "war chest" of analytical tools, skills and insights, progressively over all the selected cases.

There are other reasons for employing the case discussion method of instruction. First, it allows you to develop skills at problem definition in addition to problem solving. Cases typically do not have an obvious set of tasks whose performance will lead to mastery. Rather, they force you to sift through a mass of information, some of it irrelevant or contradictory, in order to identify the key strategic issues. Second, the case method gives you a chance to deal with ambiguity. Most cases do not have obvious "right" answers. Managers must be able to function in situations where the right answer is not known, without falling into the trap of assuming that any answer is as good as another. Some analyses and proposed strategies are clearly wrong, and some are clearly better than others are. A popular phrase in case analysis classes is "**There are *no* right answers, but there are *wrong* answers.**"

These rationales are offered because the case method may be unfamiliar to some of you and may cause initial confusion. There will be many times when I will not reveal my own opinions about a particular issue, and there will be many cases that do not end up neatly packaged with an "answer." You may discover that your preparation "misses" key points of a case, especially at first. This is a normal part of the learning experience.

The quality of your learning experience during our class discussions will be directly determined by: 1) your degree of preparation, listening, and participation, and 2) your classmates' preparation, listening, and participation. Some will not agree with you, and you may be asked to defend your argument. As long as criticism is directed at arguments and not at individuals, is relevant to the issues at hand and coherently argued, it is very much welcomed.

Case Preparation. Cases require careful preparation before coming to class. The following is a suggested list of steps to guide your case preparation.

1. Rapidly read the assigned case to gain a general understanding of the industry, the firm and the key strategic issues faced by the firm.
2. Carefully review the case discussion questions provided for the case on Brightspace to learn more about what issues require special attention.
3. Carefully re-read the case, taking notes that sort information, facts, and observations under a number of relevant headings.
4. Formulate theories or hypotheses about what is going on as you read ("the company loses money on small orders"), modifying or rejecting them as new information surfaces ("Table 2 shows that shipping costs per unit are higher for small orders, but only for long-distance shipments").
5. Perform quantitative analyses, "crunching" whatever numbers are available. Use these numbers to provide quantitative support wherever possible, particularly when exploring various hypotheses as to the nature and importance of certain phenomena. If the requisite data are not available in the case, precise descriptions of what data are missing often triggers ideas for making creative use of the information that is available.

6. Prepare definitive conclusions before you come to class concerning the key strategic issues faced by the firm in the case and how they can be addressed as well as the issues raised in the case discussion questions.
7. Bring your detailed notes with you to class to help guide your interventions in the class discussion.

Course Evaluation

Grading. Your course grade will be determined as follows:

Individual work (72% of total)

Class Participation	20%
Midterm Exam	20% or 30%
Final Exam	20% or 30%
Research Participation	2%

Team work (28% of total)

Team Final Project Paper and Presentation	<u>28%</u>
	100%

To pass this course successfully with a letter grade, a passing grade (> 60%) must be achieved in the combined average of the individual components and in the combined average of the team components. ***Please note that if your individual performance in the course is unsatisfactory, it will not be brought up by a good team grade.***

Final grades represent how you perform in the class relative to other students. Three items are considered when assigning final grades:

1. Your weighted score as a percentage of the available points for all assignments (the points you receive divided by the number of points possible).
2. The overall average percentage score within the class.
3. Your ranking among all students in the class.

In this class, the mean GPA will lie in the range 3.3 - 3.4 and no more than 45% of grades awarded in the class will be A's and/or A-'s.

Attendance Policy. Class attendance is absolutely essential. All missed classes will be noted. The policy on missed classes is to allow each student three (3) absences, no questions asked, no penalty. All further absences over this limit will reduce the student's participation grade and final course grade, no questions asked, no excuses of any kind accepted. **Students with an excessive number of absences are at risk of failing the course.** Only official university engagements, such as officially scheduled USC Marshall sponsored case competitions and sports events, will be accepted as exceptions to this policy. Job interviews are not excused so choose your absences carefully. Habitual lateness and leaving class early, for whatever reason, will be noted as evidence of low course commitment and penalized. **Simply put, you cannot learn from our class discussions, and your classmates cannot learn from you, if you are not present.**

Class Participation (20%). Because this course relies heavily on case materials, your active contribution to our case discussions is required to ensure the class's success. Each student has a responsibility to participate in class and to enhance the learning experience of all class participants. If you are not comfortable with oral participation, please let me know at the beginning of the semester and I will work with you to help you overcome this barrier. There are two key elements to class contribution which will be used to determine your grade for this component of the class.

In-class discussion contribution (10/20%)

Your overall class participation will be closely monitored. In grading oral participation, I will look at both the *quality* and *quantity* of your oral contributions. With regard to quality, the dimensions that I look for include:

- *Clarity* – is the comment succinct and understandable?
- *Relevance* – does the comment bear on the subject at hand? Comments that do not link up with what the discussion is focusing on can actually detract from the learning experience.
- *Causal Linkage* – are the logical antecedents or consequences of a particular argument traced out? Comments that push the implications of a fact or idea as far as possible are generally superior.
- *Responsiveness* – does the comment react in an important way to what someone else has said?
- *Analysis* – is the reasoning employed consistent and logical?
- *Evidence* – have data from the case, from personal experience, from general knowledge been employed to support the assertions made?
- *Importance* – does the contribution further our understanding of the issues at hand? Is a connection made with other cases we have analyzed?

Effective class participation consists of analyzing, commenting, questioning, discussing, and building on others' contributions; it is not repeating facts or monopolizing class time. The ability to present one's ideas concisely and persuasively and to respond effectively to the ideas of others is a key business skill.

Students will have the opportunity to take the lead in various aspects of class discussions (cold calls). Typically, I will ask one or more students to start the class by answering specific questions such as “If you were the person in charge in this situation, what would you do?” The quality of the contributions made at this time affect a student’s participation grade. Comments that demonstrate a lack of adequate preparation will be noted as “negative” course participation.

It is expected that you will make notes while preparing a case for class discussion. Please use the case discussion questions provided for the case on Brightspace to identify the issues that require special attention in the case. Case notes are typically 1-2 pages long and include your analysis of the industry and key competitors as well as your analysis of the company’s strategy and performance. You will also include your analysis of the problems faced by the company and your proposed solutions. I expect you to rely on your notes when contributing to the class discussions.

In most classes, you will undertake an in-class team assignment which you will turn in at the end of class. The quality of these in-class assignments will contribute significantly to your participation grade. Poor and incomplete responses will only receive partial contribution credit, whereas full and well thought out responses will receive full participation credit.

Providing you have attended the required number of classes (see Attendance Policy Section), the base participation score will be 6/10 points. Over the semester top quartile contributors will receive 4 additional points, second quartile will receive 3 additional points, third quartile will receive 2 additional points and bottom quartile will receive 0-1 additional points.

Pre-class polls (10/20%)

Throughout the semester we will have 6 polls of which you will be expected to complete 5 for full credit. Completion of each poll contributes 2 points up to a maximum of 10 points. So, you can miss one poll and still get full participation credit for this component of the participation grade. These polls are conducted every two weeks starting in Week 2 of the class and responses are due by 11.59 PM PT on the Monday of the relevant week. You receive full credit if you answer all the poll questions, there are no right, or wrong answers and I do not grade on the quality of the responses. No make-up polls or assignments will be provided so keep a track of the poll due dates and complete the required number of polls.

Midterm Exam (20% or 30%). I will give a midterm exam to test your understanding of material previously covered. The exam will consist of multiple-choice, true/false, short-essay questions, and/or short

mini-case questions. More detailed instructions will be posted to Brightspace. If you score better on the Midterm than the Final, the Midterm will be worth 30% of your grade. If you score better on the Final than the Midterm, the Midterm will be worth 20% of your grade.

Final Exam (20% or 30%). The final exam will be a two-hour exam and will consist of multiple-choice and true/false questions on course readings and short-essay questions on a new case. The date and time of the final exam is determined by the University. You should attend the exam for your specific section. More detailed instructions will be posted to Brightspace. If you score better on the Midterm than the Final, the Final will be worth 20% of your grade. If you score better on the Final than the Midterm, the Final will be worth 30% of your grade.

Research Participation (2%). Please refer to Appendix A for a detailed description of this component of your grade. As an alternative you can complete a short assignment in which you select a newspaper article about a firm that is then approved by your instructor. You then apply one course framework to the firm in the article that is relevant. The response should be between 600-800 words long and submitted by the final Friday of the class, December 6th 11.59PM PT via Brightspace.

Team Final Project Paper and Presentation (28%). You will prepare a strategic analysis of an existing company as part of a team. You will apply the concepts, analytical tools and frameworks of this course to analyze the firm's external and internal environments, identify and analyze the key strategic problems it currently faces, and present a set of recommendations to maximize the firm's long-term performance. Two to three days near the end of the course are set aside for oral presentations of your final project. The presentation allows each team to report their analysis and recommendations to the class. The exact presentation date and time for each team will be assigned by a random drawing. Detailed instructions regarding the team final project paper and presentation will be posted to Brightspace.

There are two key graded deliverables associated with the team project:

- Proposal document (8%): Due 11.59 PM PST Monday, 10/21. I will provide detailed feedback on your proposal via Brightspace. You can discuss this feedback in Office Hours appointments should your team choose to. Proposals will be graded coarsely on a Check Minus (6/8)/Check (7/8)/Check Plus (8/8) basis.
- Final project presentation (20%): Due 11.59 PM PST Monday, 12/2. The grade for this part of the assignment will be based on the content of the presentation, how well the presentation is delivered and how well questions are answered.

Peer Evaluations. Each of you will complete a peer evaluation of the members of your team with respect to the team final project. You will complete two online surveys providing feedback on your team members. The first will be alongside the proposal submission and due by 11.59 PM PST Tuesday, 10/22. The second will be following the final day of classes and due by 11.59 PM PST Thursday, 12/5. I will adjust your team grade up or down based on how well you contribute to your team based on the feedback of the second survey. The first survey simply provides a pulse check and gives team members a chance to rectify undesired behaviors.

➤ **If you experience any team-related problem (e.g. conflict, free-rider), please let me know immediately. Do not wait until the end of the semester. If you report this problem too late, there is not much I can do. Please make sure to be in touch frequently with any issues.**

Course Policies

Add/Drop Process. If you are absent three or more times prior to January 23, 2023, I may ask you to withdraw from the course by that date if you do not notify me prior to your absence. These policies maintain professionalism and ensure a system that is fair to all students.

Course Communication: Brightspace. A Brightspace website has been created for this course at brightspace.usc.edu. You should develop the habit of checking Brightspace on a regular basis. The course syllabus, PowerPoints, lecture notes, assignment information, and additional course materials will be posted on this site throughout the semester. Since e-mails sent to the class originate from the Brightspace system, it is your responsibility to ensure that my emails are forwarded to your preferred email account such as your personal Gmail account.

Communication and Entertainment Devices. Personal communication and entertainment devices such as mobile phones are to be turned off and kept off throughout the class session. Receiving or sending communication during class disrupts the learning environment and is rude to class participants. It is important that you stay engaged with the class discussion, even if you are participating remotely and through video conferencing. Videotaping faculty lectures is not permitted, due to copyright infringement regulations. Audiotaping may be permitted if approved by the professor. Use of any recorded or distributed material is reserved exclusively for the USC students registered in the class.

Class Notes Policy. Notes or recordings made by students based on a university class or lecture may only be made for purposes of individual or group study, or for other non-commercial purposes that reasonably arise from the student's membership in the class or attendance at the university. This restriction also applies to any information distributed, disseminated or in any way displayed for use in relationship to the class, whether obtained in class, via email or otherwise on the Internet, or via any other medium. Actions in violation of this policy constitute a violation of the Student Conduct Code and may subject an individual or entity to university discipline and/or legal proceedings.

No student may record any lecture, class discussion or meeting with me without my prior express written permission. I reserve all rights, including copyright, to my course syllabi, lectures, PowerPoints, prior exams, answer keys, and all supplementary course materials available to the students enrolled in my class whether posted on Brightspace or otherwise. They may not be reproduced, distributed, copied, or disseminated in any media or in any form, including but not limited to all course note-sharing websites.

Open Expression and Respect for All. An important goal of the educational experience at USC Marshall is to be exposed to and discuss diverse, thought-provoking, and sometimes controversial ideas that challenge one's beliefs. In this course we will support the values articulated in the USC Marshall "Open Expression Statement" (<https://www.marshall.usc.edu/about/open-expression-statement>).

Academic Integrity and Conduct. The University of Southern California is a learning community committed to developing successful scholars and researchers dedicated to the pursuit of knowledge and the dissemination of ideas. Academic misconduct, which includes any act of dishonesty in the production or submission of academic work, comprises the integrity of the person who commits the act and can impugn the perceived integrity of the entire university community. It stands in opposition to the university's mission to research, educate, and contribute productively to our community and the world.

All students are expected to submit assignments that represent their own original work, and that have been prepared specifically for the course or section for which they have been submitted. You may not submit work written by others or "recycle" work prepared for other courses without obtaining written permission from the instructor(s).

Other violations of academic integrity include, but are not limited to, cheating, plagiarism, fabrication (e.g., falsifying data), collusion, knowingly assisting others in acts of academic dishonesty, and any act that gains or is intended to gain an unfair academic advantage.

The impact of academic dishonesty is far-reaching and is considered a serious offense against the university. All incidences of academic misconduct will be reported to the Office of Academic Integrity and could result in outcomes such as failure on the assignment, failure in the course, suspension, or even expulsion from the university.

For more information about academic integrity see [the student handbook](#) or the [Office of Academic Integrity's website](#), and university policies on [Research and Scholarship Misconduct](#).

Please ask your instructor if you are unsure what constitutes unauthorized assistance on an exam or assignment, or what information requires citation and/or attribution.

Artificial Intelligence (AI) and ChatGPT. Students are allowed to use AI as a research tool for written assignments for this class or to create study guides for exams, similar to how one would use Google and/or other tools when conducting research. However, recall that acquisition of academic work in whole or in part from any source (from textbooks and journal articles to web resources to generative AI) and the subsequent presentation of those materials as the student's own work (whether that material is paraphrased or copied in verbatim or near-verbatim form) constitutes an academic integrity violation. Accordingly, students are encouraged to use AI as a research input, but should not rely on AI to complete assignments and pass that work off as their own. Doing so will be identified as plagiarism and will be reported to the Office of Academic Integrity. Any submitted work must be in the student's original words.

Students and Disability Accommodations. USC welcomes students with disabilities into all of the University's educational programs. The Office of Student Accessibility Services (OSAS) is responsible for the determination of appropriate accommodations for students who encounter disability-related barriers. Once a student has completed the OSAS process (registration, initial appointment, and submitted documentation) and accommodations are determined to be reasonable and appropriate, a Letter of Accommodation (LOA) will be available to generate for each course. The LOA must be given to each course instructor by the student and followed up with a discussion. This should be done as early in the semester as possible as accommodations are not retroactive. More information can be found at osas.usc.edu. You may contact OSAS at (213) 740-0776 or via email at osasfrontdesk@usc.edu.

Support Systems

[Counseling and Mental Health](#) - (213) 740-9355 – 24/7 on call

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

[988 Suicide and Crisis Lifeline](#) - 988 for both calls and text messages – 24/7 on call

The 988 Suicide and Crisis Lifeline (formerly known as the National Suicide Prevention Lifeline) provides free and confidential emotional support to people in suicidal crisis or emotional distress 24 hours a day, 7 days a week, across the United States. The Lifeline is comprised of a national network of over 200 local crisis centers, combining custom local care and resources with national standards and best practices. The new, shorter phone number makes it easier for people to remember and access mental health crisis services (though the previous 1 (800) 273-8255 number will continue to function indefinitely) and represents a continued commitment to those in crisis.

[Relationship and Sexual Violence Prevention Services \(RSVP\)](#) - (213) 740-9355(WELL) – 24/7 on call

Free and confidential therapy services, workshops, and training for situations related to gender- and power-based harm (including sexual assault, intimate partner violence, and stalking).

[Office for Equity, Equal Opportunity, and Title IX \(EEO-TIX\)](#) - (213) 740-5086

Information about how to get help or help someone affected by harassment or discrimination, rights of protected classes, reporting options, and additional resources for students, faculty, staff, visitors, and applicants.

[Reporting Incidents of Bias or Harassment](#) - (213) 740-5086 or (213) 821-8298

Avenue to report incidents of bias, hate crimes, and microaggressions to the Office for Equity, Equal Opportunity, and Title for appropriate investigation, supportive measures, and response.

[The Office of Student Accessibility Services \(OSAS\)](#) - (213) 740-0776

OSAS ensures equal access for students with disabilities through providing academic accommodations and auxiliary aids in accordance with federal laws and university policy.

[USC Campus Support and Intervention](#) - (213) 740-0411

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

[Diversity, Equity and Inclusion](#) - (213) 740-2101

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

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) 442-1200 – 24/7 on call

Non-emergency assistance or information.

[Office of the Ombuds](#) - (213) 821-9556 (UPC) / (323-442-0382 (HSC)

A safe and confidential place to share your USC-related issues with a University Ombuds who will work with you to explore options or paths to manage your concern.

[Occupational Therapy Faculty Practice](#) - (323) 442-2850 or otfp@med.usc.edu

Confidential Lifestyle Redesign services for USC students to support health promoting habits and routines that enhance quality of life and academic performance.

Course Schedule (CP – Course Pack)

#	Date	Session Topic and Agenda
Module 1: Introduction to Strategy³		
1	T 8.27	Course Introduction and Overview
2	Th 8.29	Lecture: What is Strategy? (HBS #96608) (CP)
3	T 9.3	Case: Tesla's Uncertain Fate as EV Race Accelerates (HBS #9722368) (CP) Poll 1 ¹
Module 2: Industry Analysis³		
4	Th 9.5	Lecture: The Five Competitive Forces that Shape Strategy (HBS #R0801E) (CP)
5	T 9.10	Case: Cola Wars Continue: Coke and Pepsi in 2006 (HBS #706447) (CP)
6	Th 9.12	Case: Apple Inc. in 2018 (HBS # 718439)
7	T 9.17	Lecture: Catching the Wave (HBS #95103) (CP) Poll 2 ¹ Self-Disruption Can Hurt the Companies That Need It the Most (HBS # H04MFC) (CP)
8	Th 9.19	Case: Encyclopedia Britannica (HBS #KEL251) (CP)
9	T 9.24	Case: Fasten: Challenging Uber and Lyft (HBS #616062) (CP)
Module 3: Competitive Advantage³		
10	Th 9.26	Lecture: Creating Competitive Advantage (HBS #798062) (CP)
11	T 10.1	Case: Ducati (HBS #701132) (CP) Poll 3 ¹
12	Th 10.3	Organization Design & Case: Microsoft: From Cloudy Outlook to Cloud Computing (CP)
13	T 10.8	Case: Trader Joe's (HBS #714419) (CP)
Fall Recess 10.10		
14	T 10.15	Midterm Exam
Module 4: Competitive Dynamics³		
15	Th 10.17	Lecture: Competitor Analysis: Anticipating Competitive Actions (HBS #701120) (CP)
16	T 10.22	Memphis Meats (CP) – Team Proposal due 11.59 PM PST Monday, 10/21² Poll 4 ¹
17	Th 10.24	Case: Dogfight over Europe: Ryanair (A) (HBS #700115) (CP)
18	T 10.29	Case: Bitter Competition: Holland Sweetener vs. NutraSweet (HBS#794079) (CP)
19	Th 10.31	Lecture/Mini Case: Organizational Culture (PwC Culture Survey 2021) CP
Module 5: Corporate and Global Strategy³		
20	T 11.5	Lecture: Note on Corporate Strategy (HBS #705449) (CP) Poll 5 ¹
21	Th 11.7	Case: Walt Disney Co.: The Entertainment King (HBS #701035) (CP)
22	T 11.12	Case: Danaher Corporation (HBS #708445) (CP)
23	Th 11.14	Case: Haier: Taking a Chinese Company Global (HBS #706401) (CP)
24	T 11.19	Team Case Competition (Case provided closer to time) Poll 6 ¹
Module 6: Business Ethics and Social Responsibility³		
25	Th 11.21	Lecture: Creating Shared Value (HBS #R1101C) (CP)
26	T 11.26	Case: Patagonia (CP)
Thanksgiving Holiday 11.27-12.1		
27	T 12.3	Final Presentations - Final Team Project Paper due 11.59 PM PST Monday, 12/2²
28	Th 12.5	Final Presentations
Final Exam		
<ul style="list-style-type: none"> • Section 15100: Tuesday, December 17th 4:30 – 6:30 PM • Section 15102: Tuesday, December 17th 8:00 – 10:00 AM 		

1. Polls are due at 11.59 PM PT the day (Monday) before class. You need to complete 5/6 polls for full participation credit.

2. Team feedback surveys due 11.59 PM PST Tuesday, 10/22 and 11.59 PM PST Thursday, 12/5.

3. The course Brightspace page has a folder titled “Additional Course Videos”. Students should review the videos in this folder which correspond with each course module by the time the module ends. For example, students should watch and review the videos in the folder “Introduction to Strategy Videos” prior to session 3. Likewise, students should watch and review the videos in the folder “Industry Analysis Videos” prior to session 10, when the Industry Analysis module ends, etc.

Appendix A
Management and Organization (MOR) - BUAD 497
Marshall Behavioral Research Lab
Research Participation Guidelines – Fall 2024

Participating in research activities is an essential component of your course grade. It offers valuable insights into the scientific process and its practical applications, bridging the gap between academia and real-world practices. You will engage in both online and in-person research to gain a comprehensive experience. **To earn full participation credit, you need to complete 3 steps by the specified deadlines:**

**Confirm SONA Account Reactivation &
Complete Prescreening Questionnaire (Steps
1-2)**

DEADLINE: Sept. 20, 2024

**Complete
Lab Research Studies
(Step 3)**

DEADLINE: Dec. 6, 2024

Step 1: Confirm SONA Account Reactivation (by Sept. 20, 2024)

- Receive an automated email with your login details within first 2 weeks of the semester.
- Confirm your reactivation per email instructions by re-logging into your account and resetting your password here: <http://marshall-mor.sona-systems.com/>
- Only SONA-registered, reactivated students will receive emails for study invitations.

The research participation tracking platform, SONA, is shared with your previous course, BUAD 304. We will reactivate your old account within two weeks of the semester's start. You'll receive an email with login credentials to reset the password. Credits do not transfer between BUAD 304, 307, and other courses, and any prior BUAD 304 studies will show as 0 credits. If you haven't taken BUAD 304, please create a new account on the SONA homepage. If you do not receive the reactivation email within 2 weeks, please contact us at mor.sona@marshall.usc.edu.

Step 2: Complete Prescreening Questionnaire (by Sept. 20, 2024)

- 45 minutes to complete and must be completed in one sitting.
- Access to studies is granted upon completion by the stated deadline.

Upon logging into your reactivated account, you will be prompted to complete a prescreening questionnaire. This will take about 45 minutes to complete and must be finished in one sitting. It's important to choose a time when you can focus on the questions without interruptions, as you won't be able to save your answers for later. Note that access to the studies will be granted after the prescreening questionnaire is fully completed by the stated deadline. The questionnaire covers your demographics, interests, and experiences, so please answer all questions honestly and thoroughly. Your responses will ensure that you are matched with appropriate studies and will contribute valuable information to field research.

Step 3: Complete Lab Research Studies (by Dec. 6, 2024, last day of classes)

- Earn a total of 2.0 credits; each study typically earns 0.5 or 1.0 credits.
- Participation is strictly by email invitation using an invite code.
- Study sign-up must be completed within 3 days of receiving the invitation.

Credit Requirements: You need to earn 2.0 credits by the semester deadline. Studies can be done online or in-person, with each study earning 0.5 or 1.0 credits based on its length and complexity. Your earned credits will be confirmed by email within three days of study completion. Note that studies showing inattention or poor performance will not qualify for credit.

Study Invitations: Participation in studies is by email invitation only using unique invite codes. Personalized email invitations are valid for only 3 days. Students should not attempt to log in and search for studies, as all studies require these codes. If you did not receive an invite code, the study was not intended for you at this time. Not all studies will have sufficient sign-ups for all sections at once. Invitations are sent on a rolling basis based on pre-screening criteria. Email invitations typically start 3-4 weeks into the semester.

Online Studies (sign-up & complete within 3 days of invite):

For online studies, you must complete them immediately after signing up, in one sitting, within the 3 days of your invite. Please ensure that you have uninterrupted time, a stable internet connection, and audio capability. Online studies may be completed at any time within the 3-day invitation period, as your schedule permits. Any signups not completed within 3 days will be forfeited to the next student in line.

In-Person Studies (sign-up within 3 days of invite & complete scheduled appointment):

All in-person sessions are conducted in the **Marshall Behavioral Research Lab**, located in Verna and Peter Dauterive Hall (VPD), Lower Level (LL). The room numbers are LL102, LL110, LL112. USC map link: <https://maps.usc.edu/?id=1928#1m/552631>

When you attend in person, being punctual is important in order to receive credit. If you are unable to attend or anticipate being late, please cancel at least 6 hours in advance using the SONA website to avoid penalties. Please be sure to plan your schedule so that you can participate for the entire duration of the study. In group settings, all participants must remain present even if they finish earlier than others.

Additionally, please note that, unlike online studies, in-person studies may be scheduled days or weeks in advance after receiving the study invitation. You must sign up to commit to a timeslot within 3 days. Any remaining open timeslots after 3 days will be made available to the next set of waiting students for invitations.

Alternative to Research Participation:

If you can't meet the standard participation requirements or won't be age 18 by September 27, 2024, as an alternative to the research studies, you can complete a short assignment in which you select a newspaper article about a firm that is then approved by your instructor. You then apply one course framework to the firm in the article that is relevant. The response should be between 600-800 words long and submitted by the final Friday of the class, December 6th 11.59PM PT via Brightspace.

Need Help?

Contact the Lab Research Team: mor.sona@marshall.usc.edu

Check FAQs on the SONA or Marshall Behavioral Research Lab website

**Appendix B. Relationship between Course Learning Goals
and Marshall Undergraduate Program Learning Goals**

Marshall Undergraduate Program Learning Goal	Course objectives supporting this goal
<p>1. Our graduates will demonstrate critical thinking skills so as to become future-oriented decision makers, problem solvers and innovators. Specifically, students will:</p> <p>1.1 Understand the concepts of critical thinking, entrepreneurial thinking and creative thinking as drivers of innovative ideas.</p> <p>1.2 Critically analyze concepts, theories and processes by stating them in their own words, understanding key components, identifying assumptions, indicating how they are similar to and different from others and translating them to the real world.</p> <p>1.3 Be effective at gathering, storing, and using qualitative and quantitative data and at using analytical tools and frameworks to understand and solve business problems.</p> <p>1.4 Demonstrate the ability to anticipate, identify and solve business problems. They will be able to identify and assess central problems, identify and evaluate potential solutions, and translate a chosen solution to an implementation plan that considers future contingencies.</p>	1-14
<p>2. Our graduates will develop people and leadership skills to promote their effectiveness as business managers and leaders in the 21st century's evolving work and organizational structures.</p> <p>2.1 Students will recognize, understand and analyze the roles, responsibilities and behaviors of effective managers and leaders in diverse business contexts e.g., functionally diverse, culturally diverse, geographically diverse, etc.</p> <p>2.2 Students will understand factors that contribute to effective teamwork including how to elicit, manage and leverage diverse perspectives and competencies.</p> <p>2.3 Students will recognize, understand, and analyze the motivations and behaviors of stakeholders inside and outside organizations (e.g., teams, departments, consumers, investors, auditors).</p>	1-14
<p>3. Our graduates will be effective communicators to facilitate information flow in organizational, social, and intercultural contexts. Specifically, students will:</p> <p>3.1 Identify and assess diverse personal and organizational communication goals and audience information needs.</p> <p>3.2 Understand individual and group communication patterns and dynamics in organizations and other professional contexts.</p> <p>3.3 Demonstrate an ability to gather and disseminate information and communicate it clearly, logically, and persuasively in professional contexts.</p>	14
<p>4. Our graduates will demonstrate ethical reasoning skills, understand social, civic, and professional responsibilities and aspire to add value to society. Specifically, students will:</p> <p>4.1 Understand professional codes of conduct.</p> <p>4.2 Recognize ethical challenges in business situations and assess appropriate courses of action.</p>	10, 11
<p>5. Our graduates will develop a global business perspective. They will understand how local, regional, and international markets, and economic, social and cultural issues impact business decisions so as to anticipate new opportunities in any marketplace. Specifically, students will:</p> <p>5.1 Understand how local, regional and global markets interact and are impacted by economic, social and cultural factors.</p> <p>5.2 Understand that stakeholders, stakeholder interests, business environments (legal, regulatory, competitor) and business practices vary across regions of the world.</p>	9
<p>6. Our graduates will understand types of markets and key business areas and their interaction to effectively manage different types of enterprises. Specifically, students will:</p> <p>6.1 Demonstrate foundational knowledge of core business disciplines, including business analytics and business economics.</p> <p>6.2 Understand the interrelationships between functional areas of business so as to develop a general perspective on business management.</p> <p>6.3 Apply theories, models, and frameworks to analyze relevant markets (e.g. product, capital, commodity, factor and labor markets).</p> <p>6.4 Show the ability to utilize technologies (e.g., spreadsheets, databases, software) relevant to contemporary business practices.</p>	1-14