

## Economics 101 - Corporate Strategy - Fall 2009

### Syllabus

Date	Topic	Reading 1	Reading 2	Reading 3	Speakers
21-Sep	Introduction				
23-Sep	Value of the firm	Grant 35-45, <a href="http://en.wikipedia.org/wiki/Capital_Asset_Pricing_Model">http://en.wikipedia.org/wiki/Capital_Asset_Pricing_Model</a>	Helmer: Derivation of Value Formula (study carefully)	AS&E Motley Fool; AS&E Motley Fool Earlier article; ASEI Q1 FY2009 Earnings Release	
28-Sep	Product Power	Grant 288-316; J. Warnock, "The Camelot Project"	Mitchell et al, "The Central Question in Entrepreneurial Cognition Research" <i>ET&amp;P</i> , 2007, pp. 9-27	Giovanni Dosi, "Sources, Procedures, and Microeconomic Effects of Innovation", <i>Journal of Economic Literature</i> V26, No. 3 (Sept 1988) pp. 1120-1171	
30-Sep	Strategy definition/Position Power	Grant 5-27	"A Lecture on Strategy and Innovation" by Hamilton Helmer, <i>Journal of Strategic Management Education</i> , Vol. 3	Michael E. Porter, "What Is Strategy?", <i>HBR</i>	
5-Oct	Dynamics	"What is Evolutionary Economics?" by Richard R. Nelson (uploaded to Coursework)	"Innovation, Competitive Advantage and Rent: A Model and Test" by Rita Gunther McGrath; Ming-Hone Tsai; S. Venkataraman; I. C. MacMillan, <i>Management Science</i> , Vol. 42, No. 3. (Mar., 1996), pp. 389-403.	Alvisi et al, "Playstation and the Power of Unexpected Consequences", <i>Information, Communication &amp; Society</i> , 6:4, 2003	
7-Oct	Netflix: Interplay	Brandenburger & Nalebuff, "Right Game: Use Game Theory to Shape Strategy", <i>HBR</i>	Gilbert, "Mobility Barriers and the Value of Incumbency", pp.476-511, <i>Handbook of Industrial Organization</i> , Vol. 1	Andrew Rachleff, Bethany Coates, "Netflix"	
12-Oct	Experience curve	Grant: 203-238	"Learning Curves in Manufacturing" by Linda Argote and Dennis Epple, <i>Science, New Series</i> , Vol. 247, No. 4945 (Feb. 23, 1990), pp. 920-924	Mintzberg et al, "The Honda Effect Revisited" <i>CMR Forum</i>	Bob Kaplan, former BCG head for Bay Area
14-Oct	Creativity/Establishing power	Grossman, "Nurturing Innovation in an Asset Management Firm", <i>CFA Institute</i> , December 2008	Luis M. Veicira, Alison Berkley Wagonfield, "Barclays Global Investors and Exchange Traded Funds"		Larry Tint, former N. American CEO, Barclays Global Investors
19-Oct	Pixar: Process Power	"How Pixar Fosters Collective Creativity" by Ed Catmull, <i>Harvard Business Review</i> , Vol. 86, No. 8, pp. 64-72	Margaret Talbot, "The Auteur of Anime", pp. 64-75, <i>The New Yorker</i> , January 17, 2005	George Stalk Jr., Philip Evans, Lawrence E. Shulman, "Competing on Capabilities: The New Rules of Corporate Strategy", <i>HBR</i>	
21-Oct	Pixar: Process Power	Ed Catmull, Gardiner Morse, <i>Innovation, Inc.: A Conversation with Ed Catmull</i>	"Deliberate Learning and the Evolution of Dynamic Capabilities", Author(s): Maurizio Zollo and Sidney G. Winter, <i>Organization Science</i> , Vol. 13, No. 3, <i>Knowledge, Knowing, and Organizations</i> (May - Jun., 2002), pp. 339-351		Pete Doctor, Pixar, Director of Up and Monsters, Inc
26-Oct	Netflix: Interplay	Willy Shih, Stephen P. Kaufman, David Spinola, "Netflix"	"What is a Barrier to Entry?", 2003 McAfee et al, <i>AEA Papers and Proceedings</i> , May 2004, Vol. 94, No. 2, pp.46-465		Reed Hastings, CEO Netflix
28-Oct	iPhone: Network Economies	<i>Networks and Positive Feedback: How to Exploit Network Effects</i> , Carl Shapiro, Hal R. Varian	Henry Mintzberg, "Crafting Strategy", <i>HBR</i>	David B. Yoffie & Michael Slind, "Apple Inc., 2008"	Mark Thompson, CEO Fairchild Semiconductor
2-Nov	Strategy gone wrong	Grant 240-251	"Profit Pools: A Fresh Look at Strategy" by Orit Gadeish and James L. Gilbert, <i>Harvard Business Review</i> , Vol. 76, No. 3 pp. 139-147		
6-Nov	Transforming	Fleming: "Finding the Organizational Sources of Technological Breakthroughs: the Story of Hewlett-Packard's Thermal Ink-jet" <i>Industrial and Corporate Change</i> , Vol. 11, No. 5, pp. 1059-1084	Teece et al, "Understanding Corporate Coherence" <i>Journal of Economic Behavior and Organization</i> 23 (1994) 1-30	"Toyota Throws More Weight Behind its Home Unit" by John Murray, <i>Wall Street Journal</i> , July 2, 2008	
9-Nov	Transforming	Leonard and Irwin, <i>Monsanto's March into Biotechnology</i>	"A Framework for Concentric Diversification Through Sustainable Competitive Advantage", <i>Management Decision</i> , Vol. 41, No. 4, Rijamamplanina, Abratt and Yumiko		Darlene Solomon, Director of Agilent Labs
11-Nov	Acquisitions	Grant 393-419	"Diversification Discount or Premium? New Evidence from the Business Information Tracking Series", by Belén Villalonga, <i>The Journal of Finance</i> , Vol. 59, No. 2 (Apr., 2004), pp. 479-506		
16-Nov	Wrap up (possibly presentations)				
18-Nov	Presentations				
30-Nov	Presentations				
2-Dec	Presentations				

Text

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**TITLE: Contemporary Strategy Analysis: Concepts, Techniques, Applications,**  
**EDITION: Sixth Edition (paperback)**

Readings not in Grant and not posted in Axxess are in the Course Reader