The Innovation Process: 
Developing New Products and Services

Course Number: MET AD741 SB2
Summer 2013

Mondays and Wednesdays: 12.30 - 4:00 PM
The First Class will take place on Monday 1st July 2013

Charles River Campus — Photonics Building – Room PHO 201

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Office Hours: To be scheduled for mutual convenience

When Emailing - ALWAYS PUT THE COURSE NUMBER “AD741” (and any other relevant information) in “Subject” line of email.

Materials will be delivered using the ‘Blackboard Learn’ web site for this course which can be accessed at http://lms.bu.edu

You will also need to purchase the Digital Course Pack from Harvard Business Publishing to gain access to the cases we will use in class. The link to access and purchase is: https://cb.hbsp.harvard.edu/cbmp/access/19519226

The cost of this Course Pack will be around $45, and you will need to pay this to gain access to the cases, which will then be delivered as downloadable .pdf files.
COURSE DESCRIPTION:

CATALOG DESCRIPTION

This course: “Addresses the specifics of new product and service development and fostering innovation and technology to increase performance. Topics include generating and screening initial ideas; assessing user needs and interests; forecasting results; launching, and improving products and programs; bringing innovation to commercial reality”

COURSE FORMAT:

(specific information on required materials, assignments, and grading criteria follow in later sections).

- Student reading of assigned text, cases, and articles, and extensive classroom discussion of these, especially the case studies (see below for information on the course pack and textbook you need to purchase);
- Viewing and discussion of relevant videos when available dealing with the cases or related matters.
- The writing by individuals of “case analysis and recommendation” papers and/or other short papers;
- Short “opening statement” presentations on cases or articles as assigned during the course. These brief presentations will be done by teams, which will be created in the first class.
- Written individual final exam in class. Generally this takes about 2.5 hours, but three hours will be provided. May be a combination of multiple choice, short answer, essay, and /or case questions. For further information, see Final Exam Info Note on the course web site.
- The course format emphasizes interactive learning and involvement in team as well as individual activities. It is therefore essential to prepare for all classes, participate in class discussion and in group meetings both during and outside of class, and complete assignments in a timely manner.

This course might be different to other courses that you may have taken, in that it relies significantly on the case based, "Socratic method" learning method pioneered in leading business and law schools. The case based approach emphasizes learning by asking and doing, i.e. students read accounts of specific real life business situations (cases) and are then asked in the classroom to discuss/ analyze / deconstruct what happened and why, what management actions students would have recommended if they were in the situation (deductively applying their previous conceptual learning to the deconstructed situation), and finally what generalizations/ conclusions (induction) about business phenomena or principles can they derive to be applied to future situations? This is in contrast to the more common "learning by telling" model.
If we assume that thinking is driven by the necessity to respond to real challenges and understand and solve problems, then the learning styles adopted in this course will more deeply embed learning as a result of interaction with the course materials, analyzing real life cases that reinforce learning from the class discussions and reading, trying to apply general concepts to specific situations and using this to generate actionable recommendations; and finally trying to abstract principles and conclusions that emerge from this process. We have in the past received positive feedback from students that because of using a case study approach, they felt they had retained the material better after the course, been better ability to apply it to their work lives, and found it more meaningful than rote memorization. We hope students will enjoy the extensive use of case discussions in this course.

COURSE OBJECTIVES AND OVERVIEW

This course studies the global challenge of innovation and how marketing, strategic management, and entrepreneurial issues directly impact the success of new product and service development and introduction. Concepts for creating added value (the heart of successful innovation) will be applied to a variety of types of innovations, radical and incremental, technological and procedural, and in different institutional settings such as startup-companies and large corporations.

The course draws on themes from three subject areas (themselves often entire courses): Innovation (taking ideas into value added services and products), Entrepreneurship (the process of establishing new business organizations in response to an opportunity and successfully managing their finances and growth), and Knowledge Based National Economic Development (using innovation for global competitive advantage). The course uses international examples where feasible. One or more “cases” are assigned for almost every class to provide the context for class discussion. The cases are rich in detail and lessons to be learned, and we will often find it useful to refer back to early cases as new concepts and tools are developed.

Technological innovations are emphasized (but not exclusively) because products and services based on these innovations (especially the major advances we label enabling or disruptive) frequently create the greatest added value for users, and drive worldwide business investment and job creation. Technology based innovations can impact the practices and everyday living of the future in areas as diverse as health care, business, energy, transportation, education, and ordinary living (for example entertainment and food preparation).

However a background in science or engineering is not needed, as discussions will focus on simple but profound business issues such as finding the first customers for an innovation to survive. Our goal is to give you the confidence to get involved in the management of innovations and know how to use them for global competitive advantage without necessarily having a technical background in the area of a specific innovation. This is an important skill even for those managers who do have scientific and engineering training, as they often “fall in love” with a technological innovation because of their engineering background, and are therefore blinded
to the business issues.

Students will learn practical approaches to effectively manage the innovation process and to address the changing basis of competition, especially the selection and analysis of early markets and applications, management and organizational issues, the role of “intangible factors such as aesthetics, brand image, and packaging, and the use of marketing alliances and partnerships with external parties.

SOME KEY TOPICS IN COURSE:
IMPORTANT FACTORS THAT IMPACT SUCCESSFUL INNOVATION, AND NEW PRODUCT/SERVICE DEVELOPMENT

- “Customer driven” vs. “inventor created” markets for products and services – Both have legitimate issues and challenges.
- The different institutional settings in which innovation and new product/service development occur – e.g. new ventures, existing larger corporations, government labs, universities, hospitals – and how their different “VALUE NETWORKS” (cultural preferences, self-definitions of competency and pride (“what we do” and “whom we serve” and “how we do things here” at IBM, Apple, Hewlett-Packard, etc.), and financial constraints) affect how they handle new product development and introduction.
- Relationship between overall business strategy (“the pattern of purposes, policies, practices and decisions that define the company and its businesses” – C.F. Andrews), entrepreneurship (opportunity identification and exploitation through new ventures) and the innovation strategies and practices relating to new product/service development, and technology commercialization.
- External/Environmental Analysis (stakeholder analysis, competitive analysis, Porter 5 Force Model, market dynamics and opportunities/threats, etc.), Internal/Self Analysis (identification of core competencies, and sustainable advantages), and other concepts and tools relevant to business definition, changes in strategic intent, and new product/service development.
- Understanding a company’s core competencies, and the implications (e.g. outsourcing and partnering to gain needed competencies that a company does not have internally) that can result from changes in strategic intent and business definition.
- Understanding the “changing basis of competition” and how this may sometimes favor certain customer needs (including – as detailed in Christensen’s “Product Exploration Space” both tangible things and intangibles such as style and image) rather than only technical performance. (Adams – “You Don’t know Your Customer As Well As You Think You Do”). Understanding the difference between “performance
trajectories” and “customer need trajectories.”

- Distinguishing between “disruptive” vs. “sustaining” innovations and their differential potential impact on existing markets and industry structure. “Disruptive” = rapidly evolving new methods or technology, often incorporating dramatic changes but initially not ready for the mainstream market or as good as the existing methods, but quickly getting better so that it will eventually take over as the best technology for the mainstream market. “Sustaining” = generally less dramatic or radical improvements but useful immediately for the needs of the mainstream market). Fundamental industry upsetting changes such as de-regulation or cultural changes as well as new technologies can lead to innovations that are described as disruptive.

- Understanding that disruptive innovations frequently are not economically ready or good enough for the mainstream markets, and that their appropriate management and successful “commercialization” requires finding acceptable early “beach-head” markets (frequently entirely new applications or uses), for which the “incomplete” innovation is an acceptable “whole product” (using Geoffrey Moore’s terminology).

- How the different “value networks” (see above) especially the financial expectations, profitability focus, and time horizons of industry leaders often negatively affect how they handle the challenges of major disruptions in markets, technology, or other factors.

- Using “product life cycle,” “crossing the chasm” and market segmentation concepts to guide commercialization and related decisions on business development.

- Methods for effectively assessing and “exploiting” opportunities in new “hot” fields and finding new markets for new technologies, especially understanding the “shifting basis of competition”, the advantages and disadvantages of using data from “lead users”, the need for incubation time to “discover what has been discovered”, and “discovery driven planning” to allow learning and incremental testing of assumptions. (The use of reverse income statement analysis to test assumptions). Various small business style approaches (Adams -“Big Companies Need To Act More Like Startups.”) to testing and developing markets for innovations (e.g. Kawasaki’s Rules for Revolutionaries: “Don't Worry Be Crappy”, “Churn, Baby, Churn”, “Break Down The Barriers”, etc.; Adams: “Don't Wait to Ship a Killer Product- Get to Market Fast”).

- Choosing the appropriate types and style of market research and analysis to guide new product development and introduction. Criteria such as amount of money at stake, guiding sustaining improvement in existing application vs. finding and/or choosing new markets for disruptive innovations.

- Using marketing partnerships, outsourcing, and other forms of organizational alliances to create value in products and services.

- The role of the business development function (“bizdev”) in innovation based companies. Choosing and motivating sales channels and lousiness model changes when introducing new products, or existing products or technologies into new
applications and vertical markets.

- Consumer Marketing Concepts and How They Impact The Creation, Introduction and Positioning of Innovations, including Industrial and Technological Products. The “whole product” concept revisited and using “reframing”, “branding” and “alliances” in support of this (e.g. Kawasaki’s “Make Evangelists Not Sales” and “Don’t Ask People To Do Something That You Wouldn’t”). The role of user experience and aspirations in the “product exploration space”

Thus some of the skills you should develop via cases, readings, videos, and speakers are:

- To develop an awareness of the patterns of innovation – both technological and procedural - and the forces behind them.
- To develop the detailed skills required to assess an emerging technology or innovation and to identify an appropriate strategy by which to capture the benefits of that innovation.
- To appreciate the managerial and organizational competencies required to acquire and implement technological innovation effectively.
- To explore the use of partnerships (both global and local) and networks in generating and promoting technological innovation.

We will also emphasize practical techniques in such areas as:

- Making strategic and tactical decisions (e.g. which submarket or disease area should we address first with the medical or engineering breakthrough?);
- Ways to build early revenues and business credibility in new product and market areas; and
- Data driven approaches like various types of market research to guide this process.

**COURSE WEB SITE AND EMAIL ACCOUNTS:**

The ‘Blackboard Learn’ web site link for this course at Boston University can be found at lms.bu.edu.

All students should be sure to obtain a free Boston University computer account and email address as these are necessary both for essential electronics communications with students and to use the web sites for this and other courses at Boston University. Students are expected to check the ‘Blackboard Learn’ site for announcements and assignment changes, and to read their email which will be addressed to their bu.edu email address. Note that you can arrange for your bu.edu email to be forwarded to a different preferred email address (e.g. your work or personal email address such as a yahoo or Gmail account) and you can do this via the
university web site. **If you are going to be using a ‘non BU’ email address it is essential that you do this, as the BU systems (Faculty Link; BlackBoard Learn; etc.) will only send automated and/or class emails to BU email addresses.**

I will post revisions to this syllabus, schedule changes, new readings and assignments, and so forth, as the term goes along, on the ‘Blackboard Learn’ web site where you can download them. The ‘Blackboard Learn’ site for our course also will contain numerous resources such as guides to writing case analysis papers, further instructions on assignments and the final test, and questions to guide you in reading the various assigned case studies. Note that all ‘Blackboard Learn’ materials for this course will be found in the "Information" or the “Contents” sections of this site, both of which may contain sub-folders within which I deliver the various course documents. **It is your responsibility to check this site on a regular basis, as it will be the principal means of communication during the course.**

**REQUIRED MATERIALS:**

The reading materials for this course consist of: a textbook, a Harvard Business Publishing case pack ("Course Pack") of required cases; and various additional readings and course-related information posted on the Blackboard web site.

**Required Text:**

Available from a variety of sources, including sites such as [www.ebay.com](http://www.ebay.com) or [www.amazon.com](http://www.amazon.com) as well as the Boston University Barnes and Noble bookstore.

This quite informally written book reflects Kawasaki’s experience as an key early member of the Apple team and as you will learn Apple’s experience over the last thirty years has largely shapely today’s thinking about the nature of innovation.

Towards the end of the term, there will be video shown in class that is related to this book. You should read the chapters of this book alongside of our more formal materials for an interesting alternative perspective on key themes in the innovation field (e.g. how to get early sales), and especially for its wisdom about the nature of truly consumer oriented products. Note that although we do not typically discuss all of the chapters in class, you are responsible for all of
them and the final exam typically includes several questions on the concepts in this book. You should start this book as soon as you get it.

**Cases:**
You will need access to the customized Harvard Business Publishing case pack (‘Course Pack’) of the required cases which are at the heart of the course. See the front page of this syllabus for a link to order and purchase the specific Course Pack for this semester and section.

**Readings and Other Materials:**
Additionally other required readings and materials referenced in the Course Schedule at the end of this syllabus are on the Blackboard Learn web site for this course which can be found at: http://lms.bu.edu. Remember to use the correct year, semester, course, instructor, and section number so that you are not using the website for the wrong class. Check with your fellow students or the instructor if you have difficulties finding the materials as occasionally they may be in a different place on the website than listed.

Also note that “guidance questions” (which can help you in reading and thinking about the cases but should not be used as an outline for paper or presentations) are available on this web site for most of the cases in this course.

*Please remember that the published articles and readings on our course’s web site are placed there behind a password protected firewall as “fair use” reserve reading materials for your convenience, and therefore should only be used for the academic purposes of this course, and should not be given or sold to others.*

You should bring each week’s assigned reading and cases to your classes as materials from them will often be referenced in class.

**GRADING CRITERIA AND WEIGHTING:**
Please note that Boston University strongly discourages “grade inflation” and enforces this policy though the standards and direction it gives to its faculty. The Academic Policy Committee of Metropolitan College of Boston University recommends the following guidelines for distinguishing grades, and expects faculty to maintain grades at around these levels:

- **A, A- 20% - 25%** (“Grade of A or A minus should be limited only to those students who truly distinguish themselves in the course.”)  
- **B+, B, B- 75% - 80%**  
- **Other: As Merited**

Within this context, overall grades for the course are based on a combination of the three factors listed below, are the final responsibility and authority of the instructor and reflect also an assessment of the student’s performance or rank relative to those of the rest of the class.
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Short papers
(approximately 35 % of grade based on appraisal). There will be two short papers (generally we assign written analyses and recommendation papers for two of the cases you are assigned to read and prepare for discussion). Analyzing business situations requires critical thinking that de-constructs the situation into what conceptual phenomena are at play and then making and communicating cogent recommendations that follow this analysis, and these are extremely important skills to develop.

When written case papers are assigned, you may look to the guidance questions that are posted for most cases we read (see above) to help you think about the case in an analytic fashion, but be sure to follow the format and directions in the “REQUIREMENTS & FORMAT FOR CASE ANALYSIS PAPERS” document which is posted online, as well as any additional instructions in the actual assignment listed on the schedule for that class. Among other things, this means that the paper should be tightly organized, spell-checked, broken into sections with headings, and so forth. Size limits for Individual short papers (where indicated on schedule) are generally 750 words minimum – 1000 words maximum, but see actual word limits in the schedule for the specific assignment.

In-classroom performance
(approximately 35 % of grade based on appraisal).

The instructor’s subjective assessment of your in-classroom performance is made after the last class and upon reviewing your performance over the whole term.

We want to emphasize the importance of active classroom performance both in your personal learning and in your overall grade for the course. No matter how good your individual papers or exams, a poor grade for classroom performance can really pull your course grade down.

Your classroom performance will be judged on many factors such consistent on-time attendance, level of preparation whenever you volunteer or are simply called on to respond to questions, and during class discussions and any individual presentations you do, quantity and especially quality of understanding demonstrated of the material being discussed (did you bring out new insights or recognize new issues?), active frequent self-volunteered participation in discussions (did you volunteer to add to a discussion or did you have to be involuntarily called on to get you into a discussion?) contribution to the learning of others, and your contribution to (or relative lack of contribution to) any presentations your team is assigned during the term.

Active informed class participation is essential in class discussions: this includes speaking up in class and also being able to respond with knowledge of the assigned readings and cases when asked a question in class. If other students are doing a presentation on the case or material, it does not get you “off the hook” as far as being prepared to discuss the topic.

All students are responsible for being prepared for the class discussion of all materials assigned
whether or not your team is formally presenting that particular day. For case discussions in
particular, students should be prepared to present their analysis and recommendations in a
concise, persuasive fashion and to justify their conclusions with specific facts and evidence.
Thus we will frequently begin or add to discussion of a case or reading with an unannounced
“cold call”. On such occasions, the instructor will call on at least one student to start the
discussion with an impromptu informal discussion of no more than two minutes summarizing
the material and his/her reactions and/or addressing a question the instructor raises. In this type of
impromptu “off-the-cuff” presentation, no prepared PowerPoint’s are required or even possible.
This is not about perfection, it is learning to read the material and making sure you understand
it; knowing “where you stand” on a reading, case, or issue; and improvising or “thinking on your
feet” without the benefit of detailed notes.

Note also that the quality of your team’s Opening Statement presentations and your apparent
part in them -- including both the PowerPoint and the oral presentation -- are also an important
part of how your individual classroom performance is assessed, so be sure to carefully follow
all the instructions for the presentations (see Section 2), be sure to correctly label the filename;
be sure to proof read, spell check, put your topic, date, team number, team members names
and nicknames on the front page; number the pages of the PowerPoint; stay within the slide and
time limits; make it interesting with a clear point of view,, not boring, show your team’s reactions,
analysis and recommendations, not a summary description, carefully coordinate within the team
your various slides and what you are going to talk about and advocate, and do not read from
either your PowerPoint’s or your notes.

We expect the Opening Statement presentations to be fun, informal, interesting and command
our attention, and come across as the work of a professional committed thoughtful team, not
something that repeats the obvious facts from the reading or case, reeks of sloppiness, last
minute lack of coordination, and “just going through the motions.”

**Final Test** (approximately 30% of the grade based on appraisal).
**Written individual final test.** Generally this takes about 2.5 hours, but three hours will be
provided. The test may be a combination of multiple choice, short answer, essay, and/or case-
based questions. (see Final Exam Info Note” on web site).

**GRADE WEIGHTING AND PARITY:**
Above criteria may be re-weighted during the term as deemed appropriate by the instructor, and
other assignments and forms of evaluation (for example, surprise “pop quizzes”) may be added,
and the grading weight assigned to them, and the other grading criteria correspondingly adjusted.

In occasional situations of large classes or multiple sections, where grading is shared among
several appointed graders or facilitators, efforts will be made to achieve parity in grading so that
students are graded equally “hard”. The final course grades derived from raw scores and
numerical averaging of component grades may be raised or lowered to achieve a distribution
consistent with Boston University’s grading standards.

<table>
<thead>
<tr>
<th>SOME CLASS CONTRIBUTION RULES:</th>
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<tr>
<td>It is your responsibility to listen rather than “cross-talk” (having side conversations), while I or others are speaking, as well as to take an active role in the classroom discussion and contribute to the learning environment. It is expected that you will:</td>
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<tr>
<td>1. Be on time for the start of class and in returning to the classroom after the 10 minute mid-class breaks,</td>
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<td>2. Attend all classes, and</td>
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<td>3. Actively volunteer in case discussions and interact with speakers and other students.</td>
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<td>4. I reserve the right to impose a rule of no open laptops, tablet computers, etc. if I feel that they are having a disruptive impact on the learning within the class. If I feel that these technologies are being abused, they will not be allowed. Obviously, smartphone activity, instant messaging, etc. will not be tolerated in class.</td>
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ACADEMIC STANDARDS, CONDUCT, AND INTELLECTUAL HONESTY:

This course will follow the Code of Academic Conduct of Boston University: Academic conduct promoting the desired educational environment of the College involves behavior which refrains from cheating on exams, plagiarism, misrepresentation or falsification of data, theft or destruction of examinations or papers, or alteration, forgery, or knowing misuse of academic records or documents or other similar behavior. “The internet has made plagiarism even easier, and be aware that text from the Internet is a bona fide form of plagiarism that could result in dismissal from Boston University.” This applies in any course at Boston University.

Your work must be original and in your own words, not copied from some outside source, either printed or on the internet. If you copy an entire sentence, you must put it in quotes and show plainly what you have copied and where you have copied it from. Furthermore you should not copy multiple sentences (more than two sentences) from any source, or it will be considered plagiarism, even if you provide quotes and/or references.

The university’s policy on plagiarism and other forms of cheating are published in its Academic Conduct Code. Students are required to read the code and comply with it. Any suspected violation of the Code will be referred to the Academic Conduct Review Board. You can read

α From “Code of Academic Conduct” in the Met Faculty Toolbox.  
β ditto.
and/or download a copy of the Boston University Metropolitan College Academic Conduct Code at the following web site:
www.bu.edu/met/metropolitan_college_people/student/resources/conduct/code.html

COMMUNICATIONS SKILLS REQUIRED OF MET COLLEGE STUDENTS:

"Metropolitan College students, in achieving mastery of subject matter and professional terminology must be proficient in written and spoken English in order to achieve success in their academic studies and professional careers. Please be advised that papers and oral presentations that do not meet the high normative standards of university education will be downgraded or returned for revision. Help is available at every stage of the writing process and with oral communications and presentations. Please ask your instructor, academic advisor or check the MET website” (from the "Statement on Communications Skills” dated June 18, 2003) http://www.bu.edu/met/metropolitan_college_people/student/index.html which includes links to important Student Resources such as The Education Resource Center and other Communication Resources.

Also if you are having problems with how to do case studies and other papers such as your final project report, please check the guidelines for these that I have posted on our Blackboard web site, and also feel free to arrange an appointment to discuss your concerns and questions.

Note also that MET College requires the American Psychological Association (APA) standards for writing assignments. You can find information about the APA at http://www.apastyle.org/fifthchanges.html
GUIDELINE FOR ALL PAPERS SUBMITTED TO DEPARTMENT COURSES

1. ORIGINAL ARTICLES ONLY
Submission of a paper to the department represents a certification on the part of the author(s) that the paper is an original work. Ideas of others either indirect or quoted must be referenced.

2. MANUSCRIPT STYLE
References, citations and general style of manuscripts for this Journal must follow the APA style (Please refer to the latest edition of the Publication Manual of the American Psychological Association for style questions. References should be double-spaced and placed in alphabetical order. Text and references should be single-spaced. Each reference in the paper must be fully referenced at the end under references and all items listed under the reference section must have been cited in the body of the paper.

Examples of References to Periodicals:

Journal article: One author

Journal article: Multiple authors

Magazine article

Newspaper article

Monograph

Examples of References to Books:

Reference to an entire book

Book with a corporate author
Edited book

Book with no author or editor
“Marketing opportunities in Japan” (1978) London Dentsu Incorporated

Article or chapter in an edited book

Proceedings of Meetings and Symposia

Published proceedings, published contributions to a symposium
Lee K H. (1981) “From production orientation to marketing orientation - Hong Kong in the international trade setting” In D. B. Yeaman(Ed.), *Developing global strategies* (pp. 753-766) Conference held at the University of Navarra, Barcelona, Spain, 2 (December 17-19)

Unpublished paper presented at a meeting

Doctoral Dissertations/Masters Theses

3. MANUSCRIPT PREPARATION
Margins: leave at least a one-inch margin on all four sides
Paper: use clean white, 8-1/2" x 11" bond paper.
Cover page: This should provide full authorship, along with authors’ academic degrees, professional titles, affiliations and addresses (mail, fax, and e-mail)
Title page: This should provide only the title of the manuscript, and abstract of about 100 words, and 3-10 words for index purposes.

4. SPELLING, GRAMMAR, AND PUNCTUATION
You are responsible for preparing manuscript copy which is clearly written in acceptable scholarly language (English with no errors of spelling, grammar, or punctuation). Verify the accuracy of arithmetic calculations, statistics, numerical data, text citations, and references as well as avoiding the following common errors:
- dangling modifiers
- misplaced modifiers
- unclear antecedents
- incorrect or inconsistent abbreviations

5. INCONSISTENCIES MUST BE AVOIDED
Be sure you are consistent in your use of abbreviations, terminology, and in citing references. Only use abbreviations after the abbreviation has been explained. For example, define the acronym “The North American Free Trade Agreement (NAFTA)” in the appropriate part of the document, and later in the text, it is acceptable to use “It was found that NAFTA was...”
LECTURE SCHEDULE:

This is a ‘provisional’ schedule and is subject to change as the course progresses and evolves. Historically, this course produces significant discussion, and we may need to create time for this in the schedule. I have attempted to organize the materials that we are going to be considering in a sensible way, but there is a lot of detail here, and I may introduce new and topical issues that emerge through the course of the classes. You will therefore need to keep referring to the ‘BlackBoard Learn’ site regularly to check for updates (which I will try to inform you of when they happen).

Some documents in this Schedule are annotated with (BB). This means that you can find them in the relevant area of the ‘BlackBoard Learn’ site for this course.

<table>
<thead>
<tr>
<th>Date</th>
<th>Subject Areas &amp; Themes</th>
<th>Preparation &amp; Activities</th>
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<tbody>
<tr>
<td>July 1 2013</td>
<td><strong>Introduction To The Course</strong></td>
<td>Review structure and expectations in course (per syllabus), including team structure for certain activities.</td>
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<td><strong>First Half Of Course:</strong> Understanding Innovation And Its Implications For New Product And Service Development And Market/ Application Selection.</td>
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<td></td>
<td>Relationships between strategy, entrepreneurship, and new product/service development, and underlying concepts of segmentation, stakeholder analysis, and business definition/ business model, and competitive strategy.</td>
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<td></td>
<td><strong>Case &amp; In-Class Video:</strong> Watch and discuss video on Captivate Networks, a typical “inventor driven” innovation, and how the application of the strategic intellectual tools of segmentation and stakeholder analysis create a business definition and model that leads to success. [Note: Copy of slides used in this video are available on course website.]</td>
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<tr>
<td></td>
<td>If we have time we will also consider issues arising from a video about Staples, which considers some interesting aspects of opportunity recognition.</td>
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Note: start to read the Kawasaki book as soon as you get it. We will make some references to it during the term, especially in the last few weeks. As you read alongside of our more formal materials, it provides an interesting alternative way of viewing key themes in the innovation field, especially on what it means to be truly consumer oriented. Note that although we do not discuss all of the chapters in class, you are responsible for all the chapters in this book and the final exam typically includes several questions on the concepts in this book.
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<tr>
<td>2. July 3</td>
<td>Overview Of Strategic And Entrepreneurial Concepts, And Their Relevance To Innovation.</td>
<td><strong>Readings:</strong> Schilling – Chapter 6 (BB).</td>
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<td><strong>Case Study/ Discussion Topics:</strong></td>
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<td><em>Genzyme</em> mini case at beginning of Schilling Ch. 6. (BB).</td>
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<td><strong>Opening PowerPoint</strong> – Team 1 Will be responsible for producing an Opening Statement and Slides for this case.</td>
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<td>Members of this class should read and prepare this material and be ready to apply the concepts in the chapter to analyze the situation and make cogent recommendations. Please note that the Guidance Questions to help you with this are at the end of this short case.</td>
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<td><strong>EXTERNAL ANALYSIS:</strong> Environmental, competitive, and opportunity analysis. Implicit in this is the basic “marketing analysis” including its components of segmentation and stakeholder analysis, and such frameworks as Porter’s 5 Forces, entrepreneurial analysis,</td>
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<td><strong>INTERNAL ANALYSIS:</strong> analysis of existing core competencies, and strategic intent or business definition, how these fit with an opportunity, and what new business models and other changes would be required.</td>
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<td><strong>STRATEGIC CHOICES AND THEIR IMPLICATIONS</strong> - e.g. pursue or not pursue product/ service opportunity, Applying “S.W.O.T.” Correctly To Make An On Balance Decision. Grow Organically Or Inorganically, Outsource, Partner</td>
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<td>July 8, 2013</td>
<td><strong>Sustaining Vs. Disruptive Innovations</strong>&lt;br&gt;<strong>A Distinction Between Two Types Of</strong>&lt;br&gt;<strong>Innovation And How They Differently</strong>&lt;br&gt;<strong>Interact With The “Value Networks” Of The Organizations In Which They Occur.</strong></td>
<td><strong>Readings:</strong>&lt;br&gt;Christensen: Module 1 – <em>Value Networks and the Impetus to Change</em> (BB);&lt;br&gt;Christensen: Section 1.1 – <em>Disruptive Technologies: Catching the Wave</em> (BB)&lt;br&gt;&lt;br&gt;<strong>Opening PowerPoint</strong> – Team 2 will be responsible for introducing and explaining both readings.**&lt;br&gt;&lt;br&gt;<strong>Note:</strong> One way to understand the concept of “value networks” – the financial and organizational cultures of organizations and what they prescribe and reward – is to think of them as the combination of corporate mission and ways of doing things and personal incentives, especially but not exclusively within large organizations (for example government departments or established companies like Kodak), and how these can work against the successful implementation of new or “outside the box” disruptive technologies or approaches that might be better in the long run. (We have provided two interesting optional articles on Christensen - the man and his ideas - in the OTHER READINGS OF INTEREST folder on our website).&lt;br&gt;&lt;br&gt;<strong>FYI</strong> - We have put on the course web site (in the folder SUBJECT NOTES AND REVIEWS) a PowerPoint entitled “INNOVATION &amp; CROSSING THE CHASM” which may be of help to you in reviewing the topics of this and the following week.</td>
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Case:
“Hewlett-Packard: The Flight of the Kittyhawk” case (Harvard Course pack) Note: Guidance Questions to assist you in thinking about this case and preparing for class discussion are available on our website.

Written Assignment Due (see syllabus for deadline and submission policies). Please write 750 minimum-1000 word (maximum!) Individual paper on the case (“Written Analysis of Case”) and turn it in via the Digital Drop Box. The paper should be tightly organized, spell-checked, broken into sections with headings, etc. (see the material “REQUIREMENTS & FORMAT FOR CASE ANALYSIS PAPERS” on our web site).

Remember papers should follow the assigned format, not be a list of answers to guidance questions. Be sure to very briefly summarize the background situation and what the case is about, and then analyze what is happening in the case, being sure to make appropriate reference both to the case and relevant concepts from the course and its materials, and what the application of these concepts would dictate.

Remember that specific and actionable recommendations based on your analysis and application of concepts to facts of the case are an important part of your paper. We expect you to be “opinionated” and then to support your opinions with reasons and facts. You must follow the format requirements on our web site.
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| 4. July 10 | Concepts Related To Choosing Initial Markets And Applications: “Crossing The Chasm”, Segmentation, And Stakeholder Analysis. | Reading: Moore: Crossing The Chasm And Beyond (BB) – This short but powerful article introduces the concept of the chasm in the product life cycle and the "whole product" as a way to "cross the chasm" and begin to get through to mainstream users. The concept of chasm is considered central to the study of innovation and its commercial challenges. It emphasizes the role of niche strategies in “crossing the chasm” in small steps. It also suggests some useful criteria for prioritizing the first niche applications/market targets or "beach-heads" in which to concentrate or focus efforts on making the product whole enough for its target users, and making early sales.  

Case Study: Color Kinetics (A) and Color Kinetics (B) (Harvard Course pack).  
Opening PowerPoint – Team 3 Will be responsible for producing an Opening Statement and Slides for this case.  
Read both cases and prepare to discuss. The data in case B is referred to in the A case. This interesting appendix summarizes the methodology and results of anthropology style market research that a consulting firm used to test the impact of Color Kinetics experimental deployments of its solid state illumination in a large clothing chain's retail stores in shopping malls.  
In preparing for class discussion, think especially about in 1999-2000, what are the major possible market segments to pursue (we call this segmentation), and which one or two do you recommend they focus on – i.e. give the highest priority in their sales and engineering efforts, and why? This is a key management decision that can make or break a young
company, so please be as specific as possible in your recommendations on this matter.

Note: Guidance Questions to assist you in thinking about this case and preparing for class discussion are available on our website.

**Strong advice:** Don’t make the mistakes of “focusing” on everything or using vague categories like “retailtainment” even if you see such categories used by managers in the case. Vague categories don’t tell you what to do and are therefore not so useful! It is important to take a stand and say what you would focus on and why. Even if you are wrong, resilient “improvisational” managements can quickly change directions if they are alert. Be specific and be ready to use the conceptual tools we have given you to back up your recommendations. Be opinionated.

**Video** on *Color Kinetics* will be shown in class. [Note: Copy of slides used in this video are available on course website.]

**Comparison case:** Read the collection of articles (BB) on *Kodak* and how organizational pride, not recognizing the importance of disruptive technology, and attachment to the business model/ business definition of *Kodak*’s past successes led it to being “a day late and a dollar short” on the opportunity of digital photography
Innovation Seen As The Challenge Of Creating Real Value In The Context Of Evolving Uncertainty.

How To Approach New And Uncertain Innovations And New And Uncertain Markets.

Managing Opportunity And Uncertainty: The Case For Start Up Approaches In Big Companies.

Avoid Big Mistakes.
Use Reverse Income Statements To Test Assumptions.

Don’t assume, properly validate needs rather than assume what is important for present and future customers! Think about who could be your customers and for what, not just about the customers and their usages from the past.

Organizational structure, goals, reward systems, and worries/ anxiety, and their often dysfunctional impact on product/ market decisions.

Readings:
Module II: Finding New Markets for New and Disruptive Technologies (BB). (this reading covers the shifting basis of competition and other topics such as the benefits and drawbacks of relying on lead users which will be relevant to future cases).

Section 2.3 (of Christensen) “Discovering What Has Been Discovered: What Job Was Your Product Hired to Do” (BB).

Discovery Driven Planning (And The Reverse Income Statement) (BB).

Note this last article is distinct from the similarly named “Discovering What Has Been Discovered: What Job What Your Product Hired To Do” which covers different concepts. In reading this last article, please focus mainly on the “reverse income statement” technique which is used here as a way of “sanity checking” if your hidden assumptions behind what you are proposing even make sense

CASE: Du Pont Kevlar Aramid Industrial Fiber case (Harvard Course pack). Read and prepare to discuss what this company should have done about the new fiber it created, including whether it should have built the factory.

Be sure to use the above concepts in your thinking about this case. What is the organizational background (what journalists these days call the “back story” of this case, what made Du Pont so anxious to do this, your analysis of the wisdom of building the new factory (based on the use of reverse income technique – see above article – which shows you how to
Be aware of “technological overshoot” (see Christensen articles) and its dangers. Which existing customers to listen to? Who else to listen to? Pros and Cons of “Lead User Approaches”

Accept Uncertainty And Work With It Dynamically
Provide a process for experimentation and re-assessment. - Incubation And Discovery Driven Planning.

Assessing The “Shifting Basis Of Competition” And Evolving Market Needs When Deciding Which Products/ Features To Focus On.

Use the concept of the “Exploration Space” (in Section 2.3 of Christensen) to come up with new uses and features.

We will use these above concepts repeatedly in the rest of the course.

go backwards from results to assumptions (try to do the math! – we show you how in the Guidance Questions which are posted on-line).

So what were your own reactions and recommendations for this company??

Opening PowerPoint – Team 4 Will be responsible for producing an Opening Statement and Slides for this case.

Note: Guidance Questions to assist you in thinking about this case and preparing for class discussion are available on our website.

Readings: (see below for additional readings after you do the Eli Lilly and Co. Case):

Adams, Chapter 2 – You Don’t know your Customer as well as you think you do (BB)

Adams, Chapter 9 – Big Companies need to Act more like Start-ups (BB).

Eli Lilly and Co. Case - Innovation in Diabetes Care (Harvard Course pack). What went wrong, why, and what they should do in future? Think about how Eli Lilly should have acted as a company if they had read chapters 2 and 9 in Adams, and the other articles you have read previously.

Opening PowerPoint – Team 5 Will be responsible for producing an Opening Statement and Slides for this case.

Note this is a complex case with a lot going on. Don’t get sunk in all the technicalities of various medical initiatives. Try to understand the big picture in this case, what is really going on, and especially using concepts from this and the previous week to understand the problems and the
opportunities missed. This case can be an amazing wake-up call on the challenges of medical innovation in even the best companies.

Likewise in creating recommendations, use concepts from this and the previous week and the material and opportunities you saw in the case, to make recommendations about both the substance of Eli Lilly should have done, and more importantly how it should do things differently, how its processes and structure should be different, how it can learn about opportunities, and how it can run its learning process in a "project management" responsible way, i.e. appropriate mitigate the risk.

**Note:** Guidance Questions to assist you in thinking about this case and preparing for class discussion are available on our website.

**WRITTEN ASSIGNMENT DUE:** Please write 750 minimum -1000 word maximum individual paper on the case (this is called a "Written Analysis of Case") and turn it in electronically via the via the course web site “Digital Drop Box” submission system. The paper should be tightly organized, spell-checked, broken into sections with headings, etc. (see Guidance Questions and the material “REQUIREMENTS & FORMAT FOR CASE ANALYSIS PAPERS” on our web site).

**Additional Readings** (after doing the Lily case): Read and prepare to discuss the Three Short Articles On Pfizer's Diabetes Flop (from Business Week, Forbes, and Fortune Magazine). (BB).

What do you think is wrong with these big pharmaceutical companies and the geniuses that run them? Why do they screw up like this?

This interesting failure story backs up the Eli Lilly case and its lessons:
how important it is to test for the real basis of competition and what the actual end customers the patients (who are important stakeholders even though they often are not treated as such) think of the new products, rather than assuming their reactions.

What background factors about the pharmaceutical industry do you think allowed this business disaster to happen?
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<tr>
<td>July 17</td>
<td>Second Half Of Course: How To Improve New Product And Service</td>
<td>Reading: Johnson, Christensen, and Kagermann “Reinventing Your Business Model” (BB)</td>
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<td>2013</td>
<td>Development.</td>
<td>Dropbox Case (Opening PowerPoint – Team 6 Will be responsible for producing an Opening</td>
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<td>1. Business Definitions And The Importance Of The Business</td>
<td>Statement and Slides for this case.</td>
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<td>Model. “It’s the business model, stupid” (paraphrasing U.S.</td>
<td>Note: Guidance Questions to assist you in thinking about this case and preparing for</td>
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<td>President Bill Clinton’s famous dictum, “It’s the economy</td>
<td>class discussion are available on our website.</td>
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<td>stupid!”)</td>
<td>Video on Keurig Coffee and how it used partnerships (including borrowed brands and</td>
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<td>WHERE IS THE INNOVATION AND “VALUE ADDED”, AND WHERE IS THE</td>
<td>outsourcing) to create value in its initial commercial business will be shown in class.</td>
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<td>MONEY TO BE MADE?</td>
<td>[Note: Copy of slides used in this video are available on course website.]</td>
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<td>Arrangements To Create Value In A Product/Service, And To Go</td>
<td>Coffee’s rise (BB).</td>
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<td>Beyond Initial Core Competencies</td>
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<td>2013</td>
<td><strong>Continued.</strong></td>
<td><strong>Opening PowerPoint</strong> – Team 1 Will be responsible for producing an Opening Statement and Slides for this case.</td>
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<td><strong>Using Alliances Partnerships, And Creative Distribution Arrangements To Create Value</strong></td>
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<td><strong>In A Product/Service, And To Go Beyond Initial Core Competencies.</strong></td>
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<td>(Career note: The professionals who develop alliances and partnerships for their companies are commonly called “business development” or “bizdev” people and can come out of marketing, sales, or technical and scientific backgrounds. They often deal with the unknown and un-programmed and do the first sales in a new channel or of a new product offering, and then turn over the ongoing sales operation to a traditional director of sales). They therefore have to think creatively, holistically, and to improvise a lot. They have to be “cowboys” in the best sense of the word.</td>
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Using Market Research Techniques To Add Value. Choosing The Appropriate Types And Style Of Market Research

Some thoughts when choosing “market research” in a given situation, and for being cognizant of the limitations of any research:

**What is the nature of the innovation** (e.g. sustaining for an existing market or disruptive and for new markets) you are trying to introduce, and how does this affect the goals of the “market research”? Are we doing an exploratory search (the “search” in “research”) to find a good market; or is the target market and application already known in advance?

For example, are you seeking precise understanding of customer preferences in a specific application vs. accurate understanding of broader factors and trends in the company’s competitive space, industry, and environment (as seen in the various models of strategy, stakeholder analysis, etc.).

How much money is at stake, and how does that affect the perceived needs for validation and precision vs. accuracy and direction?

**MarketSoft case** (Harvard Course Pack),
See also on our website (BB) additional articles on what happened to MarketSoft afterword.

**Note:** Guidance Questions to assist you in thinking about this case and preparing for class discussion are available on our website.

**Video on MarketSoft** will be shown in class. [Note: Copy of slides used in this video are available on course website.]

**Hyundai Uses Touch the Market To Create Clarity in Product Concepts**” (on our BB web site including accompanying photos and some guidance questions).

**Opening PowerPoint – Team 2 Will be responsible for producing an Opening Statement and Slides for this case.**

Take note of the backgrounds of these two efforts at “hearing” the “Voice of the Customer”, including why the market research was done, the nature of who the products were intended for, whether they were revolutionary/disruptive or sustaining and evolutionary, and your reactions to the strengths and weaknesses of the Language Processing (LP) (or “KJ” as it is called in Japan after the initials of its creator) and the Touch The Market methods that were used here.
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| July 29, 2013 | **Market Research (Continued).**  
*Consumer Marketing Concepts And How They Impact The Creation, Introduction And Positioning Of Innovations Today, Including Industrial And Technological Products.*  
Introducing More Expansive Interpretations Of Geoffrey Moore’s “Whole Product” And Christensen’s “Exploration Space” | **Marketware Case** Materials and Questions (Note: this is not a formal business school case, but a compendium of informal materials on BB website including some guidance questions),  
What is the background of this “case”, the “market research” methods that were used? What are your reactions to the strengths and weaknesses of this approach?  
We will also show a short video of Marketware’s founder discussing his “quick and dirty” research process to validate the opportunity and shape the product offering.  
**Opening PowerPoint:** Team 3 Will be responsible for producing an Opening Statement and Slides for this case.  
**Note:** Guidance Questions to assist you in thinking about this case and preparing for class discussion are available on our website.  
**NTT DOCOMO Case** (Harvard Course Pack) What did DoCoMo accomplish and how did they do this? What are the strengths and limitations of what they did and when is it relevant, when not relevant? Use the internet to check on the current situation of DoCoMo and how its history has affected thinking in Japan about innovation and how to successfully commercialize it. – see also Guidance questions.  
**NOTE:** PLEASE FOCUS ON THE INITIAL DOCOMO PRODUCTS AND NOT ON THE COMPANY’S LATER DECISIONS AND CHALLENGES IN DEALING WITH 3G. |
Opening PowerPoint – Team 4 will be responsible for producing an Opening Statement and Slides for this case.

Note: Guidance Questions to assist you in thinking about this case are available on our website.
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<td>10 July 31</td>
<td><strong>Consumer Marketing Concepts And How They Impact Innovation Today – (Continued)</strong></td>
<td><strong>Articles On Apple And Its Ipod Product</strong> (collectively the “Apple case” are posted in a folder titled “Apple &amp; iPod Material and Questions” on the web site, or linked into other online material.)</td>
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<td>Ethnographic Ways of Understanding the “Voice of the Customer” and “Reframing” As an Innovation Strategy.</td>
<td>Depending on time, a video of Kawasaki and various Apple related video clips will be shown either in this class or the next.</td>
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<td>Connecting product features to the lifestyle and psychographics of the consumer, and the importance of the user’s aspirations: the fuller implications of an expanded “Exploration Space.”</td>
<td>We will discuss the relationship of many of Kawasaki’s concepts (such as “DICEE”) in the book and video to the concepts in the previous weeks about creating value and whole products.</td>
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<td><strong>Applying The Concept Of “User Experience” To All Manner Of Products And Services:</strong> banks, government agencies, even university degree programs.</td>
<td><strong>Make sure you have read the complete Kawasaki book by the date of this class.</strong></td>
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The Taiwan and China experiences as an example of “value added” in practice and the importance of flexible processes to allow fast-morphing competitive advantage.

Shih’s Smiling Curve as a way to view sources of value in the value chain from ideation to manufacturing to sales.

Netbooks as an example of today’s extended “Smile Curve” – finding innovative value from multiple places in the cycle of product creation, manufacturing, and distribution.

Disciplined cost conscious integration of technological innovation, listening to the voice of the customer, brand promotion, supply chain management advantage, global distribution channels, and partnerships with retailer and component vendors...

What really counts today … “out of the box” innovation or fast creative imitation?.

“Transforming Asustek: Breaking From The Past” (Harvard Course pack)
Opening PowerPoint – Team 5 Will be responsible for producing an Opening Statement and Slides for this case.


Taiwan Review – “The Bicycle Kingdom Breaks Away.” (BB) What are the various components that add value to a product? What secrets of success and competitiveness do you think Apple and Giant / Merida share in common?

Taiwan Review “High Tech Success Made Simple” (BB) How do “branding”, aggressive integration/ incorporation of new technology (e.g. what Apple did with the iPod), and understanding the “changing basis of competition” all come together here.?

What were two elements of the changing basis of competition – i.e. what features or characteristics are important to customers – that the makers of the netbooks realized and implemented way ahead of Dell, Hewlett – Packard and other notebook brands? — although they later got blindsided by the superior “outside the box” innovation of the Apple iPad (and its quick imitation by Google/ Samsung).

What special Taiwanese core competencies made Asus (Asustek) and Acer able to deliver these features?
From what you know about disruptive approaches and the way these conflict with the financial cultures of existing market leaders, why else do you think Dell, HP, etc. may have been slow to get with both the netbook phenomenon and the tablet or pad computers made famous by Apple and Samsung?

**IF TIME** (Instructor will announce in advance if we have time for this).

Articles (on website on the Shan Zhai Ji phenomenon ("Mountain Bandit") and “Instant Company” and their implications

**Question:** Are these “game changers”? How does this capability for low cost creative copying combined with the capability for quickly implementing new business models affect what innovation is about in the future?

What is the next country/region to start pulling off Shan Zhai combined with Instant Company approaches? Korea? India? Remember that doing this requires real skills like efficient supply chain management and a keen understanding of rapidly evolving customer preferences.
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END OF COURSE
## Learning Goals

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<td><strong>Critical and Innovative Thinking</strong></td>
<td>Substantial</td>
<td>The course takes place in the classroom and incorporates significant discussion and interaction. The content is innovative, embracing ‘leading edge’ materials from the domain, and the lecturer encourages each student to question and evaluate what they hear and read in the course. In addition, recent and historic case studies are used and analyzed by the student cohort.</td>
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<td><strong>Globalization</strong></td>
<td>Some</td>
<td>The case studies used embrace global issues, and are drawn from a number of cultures and global domains. The course also benefits from the increasingly global profile of the student cohort, which brings different global perspectives to the classroom discussion.</td>
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<td><strong>Communication Skills</strong></td>
<td>Substantial</td>
<td>This course requires two individual written papers, together with significant group-based presentations of key aspects of rigorous case study analyses, and presentation of analysis from ‘key’ readings. The Case Study activity offers significant communication challenges, and the presentation element is rigorous, and is directly linked to this learning goal in a demanding way. There are also discussion periods, where vigorous debate takes place, moderated by the Course Leader.</td>
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<td><strong>Decision Making</strong></td>
<td>Some</td>
<td>The decision making in this course is built around the content of the Group Presentations, which require significant activity based around strategic direction and the selection of key issues. Students are required to think, decide, and incorporate consensus-based decisions about the Cases and ‘key’ readings in the context of the course content. Decisions also determine how the outcomes are to be presented to the wider cohort.</td>
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<td><strong>Professional Ethics and Standards</strong></td>
<td>Some</td>
<td>The course incorporates materials that require students to engage with Ethics and Governance issues, and with international and National Standards in the analysis of cases, and in the completion of the course and syllabus requirements.</td>
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