



Institution: University of Oregon
College/School: Lundquist College of Business
Department/Program: Sports Product Management

1. Program Description

a. **Proposed (CIP) number.** [52.1909 Special Products Marketing Operations.](#)

b. **Brief overview.**

The Master of Science in Sports Product Management will be a new degree program in the Lundquist College of Business producing a business degree. It is designed to produce graduates capable of managing product as a member of a product creation team (e.g. product development, product marketing, product merchandising, costing, materials, etc.) within the 800 plus sports product companies in Oregon and beyond. It differs significantly from an MBA in that it has little finance and accounting, but a significant amount of product sustainability, innovation, consumer focused marketing, design, and strategy. The Product Design Program in the School of Architecture and Allied Arts will be proposing a Master's in Sports Product Design currently targeted to begin in Fall 2016. The Design master's is envisioned by LCB and AAA as a partner program. SPM is an 18-month business degree focused on education of managers of creative design processes— marketing, ideation, and implementation for performance sports products such as footwear, apparel and equipment. The SPD master's will be a 24-month program focused on education the designers of sports product. Students in both programs will be educated together, sharing some classes and, most importantly, the integrative design project.

c. **Course of study.**

The program is 55 credit hours over six quarters (18 months). The table below shows the type of instructor and lead instructor for each course. LCB will work with the Office of the Registrar to request a subject code designation for appropriate courses.

Fall Year 1: Strategy (10 weeks): Portland

MGMT 641: INDUSTRIAL ECOLOGY (3 units) Industrial ecology represents a systems approach to the design and manufacture of products (and delivery of services) with minimized ecological impact. It breaks from traditional corporate environmental management approaches by looking beyond the boundaries of individual facilities and firms to consider the industrial metabolism within supply chains, industrial clusters, and geographic regions.

SBUS 610: SPORTS PRODUCT (3 units) Strategic and tactical issues associated with the design, manufacturing, costing, licensing, and merchandising of sports products. Course taught for the last four years in the Warsaw Center, and paperwork will be submitted to UOCC for the December 3rd deadline to for consideration for permanent number. The LCB faculty has approved this course.

MGMT 625: NEW VENTURE PLANNING (3 units) Teams of student entrepreneurs engage in customer discovery, business model development, market opportunity assessment, financial modeling, and launch planning for a new venture. Students will develop presentation materials to communicate the opportunity to customers and/or funding sources under the guidance of instructors and community based mentors.

MKTG 660: MARKETING RESEARCH (3 units) Marketing research as a tool for decision-making. Planning research projects; design, measurement, experimental and non-experimental techniques, analysis and interpretation of data; reporting research results.

SBUS 609: PRACTICUM (1 unit) Integrated Project where teams of Sports Product Management and Sports Product Design will begin a six-term project to execute a full cycle of product development within the sports product industry. This term focuses on market research and product specification. SBUS 609 practicum is an established course that has been offered within the MBA for many years. The difference here is that the projects are carried out in our laboratories with interaction with companies. The MBA version has no laboratory involvement. See the Integrated Project description.

Winter Year 1: Ideation (10 weeks): Portland

PD 610: SPORTS PRODUCT DESIGN (3 units) This course explores the rules of designing products so they can actually be manufactured. The main production methods of metals casting, sheet metal forming, and plastics molding are covered in the most depth. Materials specifications are explored for aesthetics, and for mechanical and thermal properties. Methods of accounting for manufactured parts, including weight, cost and environmental impact are also practiced. The main goal of this course is for you to learn examination, design and production methods for any object.

We expect this to be submitted to UOCC during Winter 2015.

MKTG 610: NEW PRODUCT DEVELOPMENT (3 units) Students will gain knowledge and experience of the process of identifying issues relating to the challenges of product planning, strategy and implementation. The course will expose students to actual business situations relating to brand and product management and enable students to make a more positive and immediate impact on the organizations they join upon completion of their MBA.

This course has been taught multiple times, has been approved by LCB faculty, and will be submitted to UOCC by December 10, 2014 for a Winter 2015 review.

J 610: FOUNDATIONS OF MULTIMEDIA JOURNALISM (3 units) This course approaches the practice of marketing from the perspective of the general manager. We will discuss fundamental marketing concepts and develop a framework for analyzing complex marketing challenges. Specific topics include market research, market segmentation, targeting, positioning, differentiation, value propositions, products, services, pricing, distribution, marketing communications, and branding. This has been taught several times, reviewed by UOCC once, and is under revision to be resubmitted as J627. It is Portland a resident course.

ACTG 662: STRATEGIC COST MANAGEMENT (4 units) An advanced graduate class melding strategic issues, mathematical models, and management accounting, this course gives students a thorough understanding how cost information supports the creation and implementation of corporate strategies. The course uses many cases and emphasizes decision making in a complex and ambiguous environment. Specific topics covered are customer profitability analysis, value chain and activity-based management, costs of quality, environmental cost management, the theory of constraints and capacity decisions, transfer pricing, and evaluating performance via the balanced scorecard. Students explore the topics both from the view of applied use of these concepts and also academic research.

SBUS 609: PRACTICUM (1 unit) Integrated Project where teams of Sports Product Management and Sports Product Design will begin a six-term project to execute a full cycle of product development within the sports product industry. This term focuses on ideation and design.

Spring Year 1: Execution (10 weeks) Portland

DSC 577: SUPPLY-CHAIN OPERATIONS AND INFORMATION (4 units) Strategic and tactical issues pertaining to the distribution and delivery of products and services. Methodologies and systems for designing, tracking, and managing complex global operations.

ACTG 612: FINANCIAL ACCOUNTING (3 Units) This course is an introduction to accounting, the language of business. An understanding of how financial accounting information is prepared and reported is one of the fundamental building blocks of a business education. This course is designed to assist you in developing an understanding of financial accounting concepts and techniques so you can be an effective and informed user of financial statement information. In this course students will learn to apply accounting rules to reflect underlying economic transactions; understand how differences in measurement rules affect financial statements; understand how manager judgment influences financial statements, and analyze financial statements to make business decisions.

MKTG 665: MARKETING STRATEGY (3 units) Relationship between marketing and other functional areas of a business. Emphasis on case analysis as a means of acquiring both planning and operational skills.

MGMT 614: STRATEGIC MANAGEMENT (3 units) The purpose of this course is to explore the organization as a whole and its interactions with its environment. Students will gain an understanding of critical contingency issues the organization faces in the environment and how it must manage these contingencies through its structure and strategy to gain competitive advantages. The focus will be on diagnosing and assessing organization situations and to show how large and small firms can be more effective and efficient not only in today's world but in tomorrow's as well.

SBUS 609: PRACTICUM (1 unit) Integrated Project where teams of Sports Product Management and Sports Product Design will begin a six-term project to execute a full cycle of product development within the sports product industry. This term focuses on implementation and supply chain.

YEAR 2

Fall Year 2: Global Products

SBUS 653: LEGAL ASPECTS OF SPORTS BUSINESS (3 units) Examines social responsibility and legal concepts in sports management including constitutional regulatory powers, individual participation rights, drug testing, antitrust, labor rights, intellectual property rights, sponsorships, product and event liability.

MGMT 620 MANAGING GLOBAL BUSINESS (3 units) To some globalization represents a threat; to others it represents an opportunity. In either case, managers must be prepared to work effectively with people and companies from highly divergent cultural backgrounds if they are to succeed in an increasingly competitive global business environment. With this in mind, this course examines the challenges of working and managing across cultures. Taking a comparative approach, we examine how basic organization and management processes can differ across borders, as well as various management strategies for accommodating these differences. Culture and cultural differences represents the starting point for our analyses; implications for global managers represent the conclusion. Emphasis is also given to developing the global management skills necessary to survive and succeed in the new global economy.

Winter Year 2: Integrative Project

SBUS 609: PRACTICUM (9 units) Integrated Project where teams of Sports Product Management and Sports Product Design will begin a six-term project to execute a full cycle of product development within the sports product industry. This term focuses on production of a prototype and integration of merchandising and supply chain plans.

d. Manner in which the program will be delivered.

The program will be offered at White Stag in Portland. It will be multi-modal with most instruction face-to-face and significant experiential learning components including international trips, internships and a large integrative project. Some instruction will be extension-supported, synchronous, joint offering with Eugene classes. We have developed a new innovation laboratory for prototype construction of new product concept ideas in the sports product realm. We will also develop a new innovation retail lab to test new product concepts, and allow students to learn merchandising skills, inventory management, customer service, consumer insights, etc. Classroom and library space are currently available at White Stag. Most courses exist in Eugene now. Delivery is expected to include a combination of extension from Eugene and live instruction in Portland by offering second sections. There will be LCB faculty permanently located in Portland. The mix will be a function of faculty hiring and Eugene faculty interested in teaching by either of the two modes. Current Eugene faculty members interested in teaching in Portland include, but are not limited to, Dale Morse, Roger Best, and Jim Bean. (Refer to Appendix A)

e. Ways in which the program will seek to assure quality, access, and diversity.

The program is designed to be an intensive, world-class experience with substantial incremental funding from the Sports Product Institute endowment. This project is currently a highly ranked priority for both LCB and AAA in the upcoming campaign. This endowment will provide scholarships so that talented students may attend with less impact of tuition costs. Many

professionals in this industry are former athletes. This group is more diverse than the general population. We expect diversity to flow into the student body of this program. Additionally, the undergraduate population at UO is 27% students of color leading to an opportunity for a diverse pool from which to draw. This program will also have a recommendation for a second language (not a requirement), and we will recruit accordingly since Sports Product is a global industry. A graduate will be well served to have some background in Mandarin, French, German, or Portuguese. We will recruit most students into the program with these skills in place. Beyond that, we will recommend, but not require, further language preparation.

f. Anticipated enrollment over each of the next five years.

We predict enrollments for the five years beginning F'15 to be 20, 30, 40, 40, and 50.

g. Expected degrees produced over the next five years.

We predict that degrees granted over each of the five years beginning F'15 to be 0, 20, 30, 40, and 40.

h. Characteristics of students to be served.

We anticipate that one quarter of the students will be Oregon residents, one quarter will be domestic out-of-state and one half will be international.

i. Adequacy and quality of faculty delivering the program.

We anticipate needing to hire three new FTE faculties to enable this program, two in LCB and one in Product Design. This will be done within the academic affairs machinery of LCB and AAA, but with funds raised by the program through endowment, operating gifts and tuition. Due to the richness of talent in the companies and academic programs in sports business in this state, the quality will be readily available.

j. Faculty resources – full-time, part-time, adjunct.

Faculty available or hired for the program will be a mixture of full-time tenure track, full-time non-tenure track and adjuncts. The mixture is being carefully monitored to meet program objectives while balancing expectations of AACSB accreditation. Sports Product was selected in both the Strategic Investment process and Cluster Hire process for central investment in additional faculty. There is already a substantial endowment in place.

k. Other staff.

Full time positions include the director of the MS SPM program, program coordinator, director of experiential learning, two innovation lab technicians, support administrative staff, and two part time GTFs. The permanent director search will complete by early Winter, 2015.

l. Facilities, library, and other resources.

White Stag has adequate classrooms and library facilities. We are building out a new Innovation Lab under the Burnside Bridge to enable this program and other product design related programs at White Stag.

m. Anticipated start date.

Anticipated start date is September 2015.

Revised 11L 23L 14

Lundquist College of Business: Proposed Master's in Sports Product

Course No.	Course Title	Units	SA	SP	PA	IP	Lead Instructors (*)
Fall Year 1	Strategy						
MGMT 641	Industrial Ecology	3				3	Josh Skov
SBUS 610	Sports Product	3				3	Ellen Devlin
MGMT 625	New Venture Planning	3				3	Nathan Lilligard
MKTG 660	Marketing Research	3	3				Roger Best
SBUS 609	Strategic Planning Project	1	1				Jim Bean
Winter Year 1	Ideation						
PD 610	Sports Product Design	3		3			Kiersten Muenchinger
MKTG 610	New Product Development	3	3				New Hire
J 610	Foundations of Multimedia Journalism	3	3				Wes Pope
ATCG 662	Strategic Cost Management	4	4				Dale Morse
SBUS 609	Strategic Planning Project	1	1				Jim Bean
Spring Year 1	Execution						
DSC 577	Supply Chain Operations & Info.	4	4				Nagesh Murthy
MKTG 665	Marketing Strategy	3				3	New Hire
ACTG 612	Financial Accounting	3			3		Michele Henney
MGMT 614	Strategic Management	3	3				New Hire
SBUS 609	Strategic Planning Project	1	1				Jim Bean
Fall Year 2	Global						
SBUS 653	Legal Aspects of Sports Business	3			3		Will Glasson
MGMT 620	Managing Global Business	3				3	New Hire
Winter Year 2	Integrative Project						
SBUS 609	Practicum/Integrative Project	9	9				Jim Bean

55 31 3 6 15
100% 56% 5% 11% 27%

AACSB Instructor Definitions

- SA** **Scholarly Academic:** Tenured or tenured track faculty with doctorate degrees
- SP** **Scholarly Practitioner:** Tenured or untenured faculty with doctorate degrees engaged in professional activities
- PA** **Practice Academic:** Tenured or tenured track faculty with masters degrees with relevant research and professional experience.
- IP** **Instructional Practitioner:** Untenured faculty with masters degrees and substantial professional experience.
- (*)** **Lead Instructors:** Responsible for course syllabus and course development

2. Relationship to Mission and Goals

- a. **Supports the institution's mission and goals.**

This program will be a pioneer in combining traditional classroom teaching and intensive experiential learning. The experiential learning will include experiences in both the innovation lab and the innovation store (Retail space). The learning will also include international trips, and international internships.

The program was developed in accordance with the white paper on experiential learning developed by Ron Bramhall, LCB faculty, in 2006. The program will serve an established need in the sports product industry, an alpha-cluster of companies in Oregon.

The Sports Product industry has partnered with UO in the development of this program, with over 36 industry executives, representing 18 different companies serving on the Sports Product Management industry advisory board. The companies have agreed to take interns, as well as provide jobs for our graduates, including large companies such as adidas, Ching Luh, Columbia Sportswear, Nike and Underarmour, medium size companies such as KEEN Footwear, Brooks Running Company, and Yakima Racks and small companies such as Lucy, Handful Bras, and Exit 21. This serves the UO goal to aid in economic development in the state. The Sports Product Institute will support research pertinent to its mission including marketing, cost accounting, sustainable business, product design, human physiology and green chemistry. This is consistent with the AAU mission of UO.

SPM Program Hiring Plan

The Department of Marketing, Lundquist College of Business seeks to fill two professor positions effective June 2015. One position is in **Product Innovation** and the other in **Marketing Strategy**.

SPI/SPM Director: Search for this position was closed November 21, 2014 and complete hiring process by year-end 2014. The director will share their time 50% with the Sports Product Institute (SPI) and 50% Sports Product Management (SPM)

SPM Office Coordinator: To be hired by January 2015

SPM Program Manager: To be hired by March 2015

Director Experiential Learning: To be hired by June 2015

b. Connection to the institution's strategic priorities.

Sport has been a strategic academic focus of the University of Oregon for nearly two decades. The Warsaw Sports Marketing Center was the first such center in any business school. A support letter from the Warsaw director is included. The Law School has used sport as a manner of conflict resolution and is opening a Sports Law Institute this summer. Human Physiology works closely with athletes in its Bowerman Laboratory. This program will significantly enhance economic development in the state, grow the graduate student populations, and connect research in a variety of areas such as green chemistry, journalism, law, human physiology, product design, management, marketing and accounting. Sports Product is one of the University's 10 cluster hire topics to be emphasized during the upcoming campaign.

c. Manner in which the proposed program contributes to Oregon University System goals for access; quality learning; knowledge creation and innovation; and economic and cultural support of Oregon and its communities.

This program will produce a new type of professionals that focus groups have indicated is a serious need for the over 800 sports product companies in Oregon to continue to thrive. The intensity and richness of the experience planned here will be at the cutting edge of professional pedagogy.

All students admitted to the program already have a bachelor's degree so it will not impact 40/40/20 goals.

d. Manner in which the program meets broad statewide needs.

Sports products industry is considered an alpha cluster of companies in Oregon. For this industry to remain Oregon-centric, we need to produce the human resources necessary for them to thrive. The industry has indicated that product excellence is critical to their long-term success. This program is focused on educating the business people who create this product in these companies. This is a major need for these companies now and in the future. This program is designed to fill that need.

3. Accreditation

a. Accrediting body or professional society.

The MS in SPM will be part of the Lundquist College's AACSB accreditation.

b. Ability of the program to meet professional accreditation standards.

The faculty plans have been carefully laid out to be within AACSB requirements.

c. If the proposed program is a graduate program in which the institution offers an undergraduate program, proposal should identify whether or not the undergraduate program is accredited and, if not, what would be required to qualify it for accreditation.

This is a part of AACSB accreditation requirements.

d. If accreditation is a goal, the proposal should identify the steps being taken to achieve accreditation. If the program is not seeking accreditation, the proposal should indicate why it is not.

It will be reviewed as part of the normal AACSB cycle of program review at UO Business.

4. Need

a. Evidence of market demand.

This program was developed after intensive market research. Individual interviews and focus groups involving over 150 senior executives in the sports product industry met to answer the question – “what is the greatest educational need of this industry that UO could address?” The program designed here is the output of those discussions. Further, there is a 36 person External Advisory Board, representing 18 sports product companies, that meets thrice yearly to continue input on the development of the program. We also conducted interviews with approximately 50 current Warsaw Sports Marketing Center affiliated undergraduate and MBA students, as well as LCB alumni affiliated with the Warsaw Sports Marketing Center currently working in the sports product industry. Their support was strong, and they felt this would be a valuable addition to the UO efforts to create an educational pathway into the sports product industry. The first offerings

have been multiple day workshops. The last four workshops have sold out, with participants attending from across the USA as well as international participants.

This program will not cannibalize sports business students affiliated with the Warsaw Sports Marketing Center as they address very different segments of the sports industry. Sports business is involved in the service sector including events, sponsorships, and marketing. Students typically have backgrounds in marketing, management, humanities, social sciences and journalism. Sports product overlaps the manufacturing or product sector. Students will have backgrounds in biomechanics, engineering, chemistry, design, supply-chain management or business. Together, Warsaw and Sports Product place UO at the forefront of education and research for the sporting industry, a critical sector of the Oregon economy.

b. If the program's location is shared with another similar OUS program, proposal should provide externally validated evidence of need.

PSU has recently initiated an undergraduate certificate in Sports Retailing. The UG Sports product certificate at PSU aims at educating students for sports product retailing. PSU has no product design so their program is structured very differently than our proposed MS program. PSU is also offering a non-credit certificate in Athletic & Outdoor Sports Management through their Academic Extension Department. These programs are complementary and also needed by the industry. We are working with PSU leadership and we have collaboratively presented the collection of programs to the industry.

c. Manner in which the program would serve the need for improved educational attainment in the region and state.

There are currently no programs worldwide that focus on the educating managers for the business side of product creation for the sports product industry. Industry representatives have told us that this is a great need within their business processes. We are being responsive to this need.

d. Manner in which the program would address the civic and cultural demands of citizenship.

Product Design is part of the design ethic that is a driver of Portland's business culture. By officially marrying product design and business we are extending that culture through the business processes of the 800 companies in this industry in Oregon. In addition, the SPM program intends to pursue research focus around sustainable business innovation. This focus on scholarship and pragmatic implementation that uniquely fits the state of Oregon, the sports product industry and several University of Oregon departmental programs in product design, chemistry, and business.

5. Outcomes and Quality Assessment

a. Expected learning outcomes of the program.

1. Demonstrate the ability to understand and apply learning to the functional areas such as cost accounting, product design, product development, and the supply chain of the sports product industry.
2. Access, use, and evaluate the sports product retail experience and consumer information in the sports product creation process.
3. Use quantitative and qualitative analytical and critical thinking skills to evaluate information, solve problems, and make good business decisions in a sports product creation environment.
4. Communicate effectively in various forms.

5. Demonstrate knowledge and application of a strong ethical code and strong ethical behavior in the workplace.

b. Methods by which the learning outcomes will be assessed and used to improve curriculum and instruction.

In traditional courses, there will be exams and feedback. In the extensive experiential programs, there will be product reviews and intensive feedback from faculty and industry experts.

c. Program performance indicators.

- Percent placed in the sports product industry within 3 months of graduation.
- Continued professional success of graduates.
- Volume and quality of admissions applications.
- Quality of applicants accepted into the program.
- Domestic and international recognition of the program.

d. Nature and level of research and/or scholarly work expected of program faculty; indicators of success in those areas.

During UO's Big Ideas program, we developed the Green Product Design Network that linked green chemistry, business, and product design so that product design could be taken back to the molecular level, producing new materials that satisfied both functional and environmental specifications. One of the industry clusters formed by the Big Idea team was around sports product. We plan to link this Big Idea project with the educational projects within the Sports Product Institute. Discussions about the program have uncovered many other research topics of interest to the industry and the faculty. Several are noted in Section 2a.

6. Program Integration and Collaboration

a. Closely related programs in other OUS universities and Oregon private institutions.

As mentioned above, PSU has an undergraduate certificate in Sports Product Retailing. There are no programs combining business and product design of which we are aware.

b. Ways in which the program complements other similar programs in other Oregon institutions and other related programs at this institution.

As mentioned, this program complements the Warsaw Sports Marketing program at UO, a partner in this endeavor; the new master's in product design, in Product Design within AAA, a partner in this endeavor; and the undergraduate certificate in sports product retailing at PSU. We have had conversations with PSU leadership about co-marketing their programs and ours, and about sharing lecturers and guest speakers.

c. If applicable, proposal should state why this program might not be collaborating with existing similar programs.

N/A

d. Potential impacts on other programs in the areas of budget, enrollment, faculty workload, and facilities use.

The financial situation at LCB in Eugene does not allow funding or faculty time to be drawn from that budget. We are planning to support this program with new faculty resources and

endowment, operational gifts, and tuition from incremental students. Eugene faculty capacity engaged in the Portland program will be replaced in Eugene with SPM funding as appropriate.

7. Financial Sustainability (attach the completed *Budget Outline*)

a. Business plan for the program.

We have already raised funding necessary to get us to program launch/tuition flow. We have a long-term business model that is based on endowment, operational gifts, and tuition funding flowing from the University budget model. The LCB Board of Advisors has indicated that raising \$20MM for this program should be relatively easy and have committed to assisting us in that endeavor. Rick and Erika Miller are the lead donors with committed gift of \$15MM. An additional gift of \$5MM is in discussion. The program is ranked highly in the LCB priorities for the upcoming campaign. The partner master's in product design is ranked highly in the AAA and University priorities for the campaign. The program startup expenses are being covered by donations of \$525,000 in addition to the \$400,000 loan from the provost's office to be repaid from program proceeds. The University's Strategic Initiative process provided an additional \$150,000 for program startup.

b. Plans for development and maintenance of unique resources (buildings, laboratories, technology) necessary to offer a quality program in this field.

This program will need a substantial laboratory that is a production facility for student innovation in the sports product industry. The Innovation Lab will be located in the space beneath the Burnside Bridge. The partnering companies are donating equipment. The program will have a retail space for student teams to develop merchandising plans and to display their prototypes. We will begin with e-commerce and "popup stores," and a 2500 square foot space in the new Gerding Edlen building on NW First and NW Davis.

c. Targeted student/faculty ratio (student FTE divided by faculty FTE).

Due to the experiential components of this program, student/faculty ratio will be much lower than other UO programs. We estimate 10 to 1 at this time.

d. Resources to be devoted to student recruitment.

We have budgeted \$250,000 per year for marketing. Due to the intense experiential components of the program, it will never have a particularly large enrollment. A recruiting web site is currently under development.

8. External Review (if the proposed program is a graduate level program, follow the guidelines provided in *External Review of new Graduate Level Academic Programs* in addition to completing all of the above information)

An External Review Committee composed of two academics (Bill Lovejoy-University of Michigan and Don Morrison-UCLA) and one industry professional (Stephanie Vardavas JD) were commissioned by the Graduate Council, and briefed by the SPM team. They reviewed the proposal, and submitted their report. The SPM team submitted their response. Both have been provided to the Graduate council.

University of Oregon
 MS in Sports Product Management
 Academic Year 15-16

FIRST year

	Column A Current unit	Column B Realloc	Column C State App	Column D Fed funds	Column E Other Income	Column F TOTAL
Personnel						
Faculty	\$ 455,300				\$ 50,000	\$ 505,300
Grad Asst	\$ 10,000					\$ 10,000
Support Staff	\$ 230,000					\$ 230,000
Scholarships/Fellowships	fundraising					\$ -
OPE	\$ 263,936					\$ 263,936
Nonrecurring	\$ -					\$ -
Personnel Subtotal	\$ 959,236	\$ -	\$ -	\$ -	\$ 50,000	\$ 1,009,236
Other Resources						\$ -
Library/printed	\$ -					\$ -
Library/electronic	\$ -					\$ -
Supplies/Services	\$ 292,000					\$ 292,000
Equipment	\$ 25,000					\$ 25,000
Other expenses	\$ 6,660					\$ 6,660
Other resources subtotal	\$ 323,660	\$ -	\$ -	\$ -	\$ -	\$ 323,660
Physical Facilities						\$ -
Construction	\$ -					\$ -
Major renovation	\$ -					\$ -
Other expenses	\$ 40,000					\$ 40,000
Physical facilities subtotal	\$ 40,000	\$ -	\$ -	\$ -	\$ -	\$ 40,000
Grant Total	\$ 1,322,896	\$ -	\$ -	\$ -	\$ 50,000	\$ 1,372,896

University of Oregon
 MS in Sports Product Management
 Academic Year 16-17

SECOND year

	Column A Current unit	Column B Realloc	Column C State App	Column D Fed funds	Column E Other Income	Column F TOTAL
Personnel						
Faculty	\$ 495,352				\$ 50,000	\$ 545,352
Grad Asst	\$ 10,400					\$ 10,400
Support Staff	\$ 239,200					\$ 239,200
Scholarships/Fellowships	fundraising					\$ -
OPE	\$ 282,501					\$ 282,501
Nonrecurring	\$ -					\$ -
Personnel Subtotal	\$ 1,027,453	\$ -	\$ -	\$ -	\$ 50,000	\$ 1,077,453
Other Resources						\$ -
Library/printed	\$ -					\$ -
Library/electronic	\$ -					\$ -
Supplies/Services	\$ 662,000					\$ 662,000
Equipment	\$ 50,000					\$ 50,000
Other expenses	\$ 6,660					\$ 6,660
Other resources subtotal	\$ 718,660	\$ -	\$ -	\$ -	\$ -	\$ 718,660
Physical Facilities						\$ -
Construction	\$ -					\$ -
Major renovation	\$ -					\$ -
Other expenses	\$ 50,000					\$ 50,000
Physical facilities subtotal	\$ 50,000	\$ -	\$ -	\$ -	\$ -	\$ 50,000
Grant Total	\$ 1,796,113	\$ -	\$ -	\$ -	\$ 50,000	\$ 1,846,113

University of Oregon
 MS in Sports Product Management
 Academic Year 17-18

THIRD year

	Column A Current unit	Column B Realloc	Column C State App	Column D Fed funds	Column E Other Income	Column F TOTAL
Personnel						
Faculty	\$ 515,166				\$ 50,000	\$ 565,166
Grad Asst	\$ 10,816					\$ 10,816
Support Staff	\$ 248,768					\$ 248,768
Scholarships/Fellowships	fundraising					\$ -
OPE	\$ 293,801					\$ 293,801
Nonrecurring	\$ -					\$ -
Personnel Subtotal	\$ 1,068,552	\$ -	\$ -	\$ -	\$ 50,000	\$ 1,118,552
Other Resources						\$ -
Library/printed	\$ -					\$ -
Library/electronic	\$ -					\$ -
Supplies/Services	\$ 662,000					\$ 662,000
Equipment	\$ 35,000					\$ 35,000
Other expenses	\$ 6,660					\$ 6,660
Other resources subtotal	\$ 703,660	\$ -	\$ -	\$ -	\$ -	\$ 703,660
Physical Facilities						\$ -
Construction	\$ -					\$ -
Major renovation	\$ -					\$ -
Other expenses	\$ 50,000					\$ 50,000
Physical facilities subtotal	\$ 50,000	\$ -	\$ -	\$ -	\$ -	\$ 50,000
Grant Total	\$ 1,822,212	\$ -	\$ -	\$ -	\$ 50,000	\$ 1,872,212

University of Oregon
 MS in Sports Product Management
 Academic Year 18-19

FOURTH year

	Column A Current unit	Column B Realloc	Column C State App	Column D Fed funds	Column E Other Income	Column F TOTAL
Personnel						
Faculty	\$ 535,773				\$ 50,000	\$ 585,773
Grad Asst	\$ 11,249					\$ 11,249
Support Staff	\$ 258,719					\$ 258,719
Scholarships/Fellowships	fundraising					\$ -
OPE	\$ 305,554					\$ 305,554
Nonrecurring	\$ -					\$ -
Personnel Subtotal	\$ 1,111,294	\$ -	\$ -	\$ -	\$ 50,000	\$ 1,161,294
Other Resources						\$ -
Library/printed	\$ -					\$ -
Library/electronic	\$ -					\$ -
Supplies/Services	\$ 662,000					\$ 662,000
Equipment	\$ 35,000					\$ 35,000
Other expenses	\$ 6,660					\$ 6,660
Other resources subtotal	\$ 703,660	\$ -	\$ -	\$ -	\$ -	\$ 703,660
Physical Facilities						\$ -
Construction	\$ -					\$ -
Major renovation	\$ -					\$ -
Other expenses	\$ 50,000					\$ 50,000
Physical facilities subtotal	\$ 50,000	\$ -	\$ -	\$ -	\$ -	\$ 50,000
Grant Total	\$ 1,864,954	\$ -	\$ -	\$ -	\$ 50,000	\$ 1,914,954

November 3, 2014

To: Professor Andy Berglund, Dean of the Graduate School, University of Oregon
From: Sports Product Management external review committee (Bill Lovejoy, Stephanie Vardavas, Don Morrison)

Re: External Review Committee report on the Sports Product Management Program

Here, as requested, is our external reviewer report on the proposed Sports Product Management (SPM) Program. We have divided the report into five self-explanatory sections.

I. Program mission and need (Should we do it?)

Sports and outdoor products have been identified as an alpha cluster for the state of Oregon. While specific estimates vary, it is clear that the cluster includes hundreds of firms employing thousands of people, and is well-aligned with Oregonians' values and lifestyles. The industry is knowledge-intensive and dependent on innovation, suggesting advantages to an academia-industry collaboration. Testimony in the reading materials suggests that industry demand side is robust (more on this below) for sports product design professionals. These factors combine to recommend this program as important and timely. The committee agrees that this is an opportunity for the state of Oregon that few competing regions could duplicate, and therefore a potential source of sustainable competitive advantage.

There are several thematically similar programs at other institutions in the state, and the committee is unfamiliar with the details of each. In response to questions from the committee, Ellen Schmidt-Devlin and Jim Bean surveyed related design and business programs focusing on sports products. It appears that in academia the combination of graduate level, business-design collaboration focusing on sports products is unique. If this is the case, then it would be a valuable addition to Oregon's portfolio of initiatives.

The demand for graduates of the SPM program was investigated prior to this committee's convening, via a large number of interviews with sports product industry leaders, academics, students and other stakeholders. The report states that the "participants enthusiastically supported the proposed SPM programs." No data was given to the committee that proves this claim.

This is not unusual for a program in the planning stages. Interviews tend to be open-ended and relatively unstructured, not lending themselves to simple quantification. Promises of interest and support a year out are sometimes reliable and sometimes not. There is no guarantee for any new program until students matriculate, graduate and get hired. That is, programs such as this seldom launch into an environment of complete information.

The committee believes that the UO team has done a significant amount of outreach and research into the topic of industrial demand for the SPM program and its graduates. Supporting evidence includes the long list of members of the industrial advisory board.

While the committee believes that this is an excellent bet, it suggests that the UO team pursue some hard commitments from industry to provide concrete evidence of need. For example, can they secure commitments to sponsor internships, or commitments to sponsor or hire graduates? Any hard commitment at this point would be helpful in demonstrating in explicit terms the demand for this program.

The target student has a technical background (for example, an engineering degree or some focus on the technical side of business or design) and 2-4 years work experience. The committee shares the UO team's enthusiasm for combining the technical aspects of design with some business basics to train managers of creative projects in the sports product industry. The committee is agnostic about the work experience. More mature and experienced people are typically better positioned to lead, but will also need to graduate into higher, better paid positions which are naturally less plentiful. We defer to the internal committee on this.

Finally, the committee finds the cross-disciplinary collaboration between the LCB and AAA particularly exciting, combining the worlds of design and business. The need for managers to understand how products are made is in our opinion a critical need nationally, not restricted to Oregon. The usual impediments combining two disparate thought-worlds prevents this synthesis on many campuses. This is an opportunity for UO to start something that is both valuable and more rare than it should be.

II. Resources and Complementary Assets (Can we do it?)

The UO team observed that there is a wealth of talented industry insiders in and around the Portland area who can help with the experiential part of the delivery.

The new AACSB guidelines requiring 40% research-active, tenure-track participation in the delivery of new programs is a healthy one, assuring that the careful, critical eyes of research-active faculty will be central to the character and integrity of the degree.

We are not in a position to judge tenure-track faculty capacity and capability at LCB. We do know that there exist highly qualified professors in the LCB that could deliver the required material. What we do not know is their existing course load or enthusiasm for participating, or the depth of the bench strength of interested faculty. We were informed that a pending major gift would allow the hiring of additional faculty for the SPM program, and that some professors may welcome the chance to teach an additional section of one of their current preps. All of this suggests that the program can launch with quality instructors in the classroom.

We do recommend, however, that some longer-range planning take place to develop a 2- and 3-year plan for instructional support that maintains the appropriate mix of qualified and enthusiastic tenure-track and adjunct instructors.

UO, other universities and the greater Portland area seem to boast an array of complementary assets which again speak to a difficult-to-replicate competitive advantage for this program. The LCB has centers of excellence in sports marketing, entrepreneurship, finance/pension management, and sustainable business practices. The AAA school has a sports product design program. The Warsaw Center has a strong presence in the sports business, and strong connections to industry. A variety of existing undergraduate programs mean that (many) faculty will already have some institutional knowledge in the sports business. This is a very strong supporting ecosystem.

The experiential component of the program is essential to its mission. The availability of, access to and training on prototyping equipment in AAA and the new innovation space in the White Stag building are very important to the program. Currently these facilities are well-positioned to prototype fabric products, can support appearance modeling but not functional prototypes in footwear, and will need additional resources to prototype other equipment such as helmets or metal products.

The staffing and maintenance of fabrication spaces such as these can be very expensive, and we did not see any formal understanding for sharing costs and responsibilities. An informal arrangement may be sufficient for the first year or two, but eventually the actual costs for these spaces will have to be formally recognized in somebody's budget, appropriate for the level of use by the various student groups who share these resources.

Finally, the committee was very impressed with the energy and enthusiasm of the SPM "core team" of Ellen and Jim. We did not have the privilege of meeting Roger Best, another core team member. Often, important new initiatives are brought to life by the tireless work of a small team of dedicated people. Currently, this core team is indispensable. We recommend that some thought be given to succession planning, so that the program can continue and thrive even if some members of the core team are no longer available.

III. Financial model (Can we afford it?)

Given the costs and revenues for the SPM program, it appears to break even at about 20 admits/year (30 students in residence on average, due to the 1.5 year nature of the program). This relatively low break-even generates confidence that the program will make money after it reaches equilibrium. We also understand that there may be gift money available in the early years to cover shortfalls, in which case the program would impose no drain on current budgets.

The forecasted enrollment for the first year is 20 students. The committee's confidence is not high that this number will be met. This is not due to the quality or attractiveness of the program, but rather the very long approval cycle that will delay the official program

launch (and aggressive marketing outreach) until January or beyond. That is a very late launch date for an academic program. Students often solidify their plans in the fall, and the target demographic for this program (with 2-4 years work experience) will need time to re-organize their lives to survive 1.5 years without a paycheck. If, for example, the program launch is delayed until March it could severely compromise the program's ability to attract a robust high-quality class by September. This challenge would not repeat in the second year and beyond.

The committee believes that attracting a very high quality inaugural class is important, because their placement and performance on the job post-graduation will be critical benchmarks for the program as a whole, from the perspectives of both prospective students and industrial sponsors. We would not want to see that quality compromised for the sake of making numbers, especially in the first year when making numbers might be difficult.

The committee recommends that expectations be calibrated to an inaugural class of 10 – 15 very high quality students. It is our understanding that gift money may be available to accommodate a smaller class without imposing a serious resource drain on current cash flows. In addition to being more realistic when launching a new academic program so late in the academic year, the inaugural year will be one of discovery while facing, resolving and learning from start-up glitches. A smaller, tight group of students might be better for navigating those waters.

IV. Curriculum (What should it look like?)

The curriculum looks strong, and is integrated with a program-long experiential exercise. This looks like a great program. If the committee were to make some recommendations at the margin, they would be the following. We understand that acting on all of these would be infeasible, we list these only for consideration.

- a) Put financial accounting earlier in the program: Reading financial statements is a core competency of anybody working in the business world or intersecting with it. This is the language of business, and this facility allows students to understand who is making money in a supply chain, to compare companies and competitors, and to map the concrete, product-oriented reality of their world to the cash flow and accounting reality of upper management.
- b) Have some, at least rudimentary, introduction to discounted cash flows. New product managers will have to work within a company's budgeting system, which will often involve differential hurdle rates for different types of projects (segmented by market and technical risk). Projects need to meet hurdle rate requirements as well as other common benchmarks like payback periods or internal rates of return. Students do not need an entire course in corporate finance, but they need to understand how the market (and company) would value and compare risky cash flows.

- c) Add a course (or add material to an existing course) on managing creative projects. This would include classical project management content like precedence networks and critical paths, but also some organizational content on team dynamics (e.g. sources and resolutions of conflict within teams) and leading creative teams. For creative projects developing a unifying vision for the project and reacting to unexpected changes as a cohesive team are necessities.
- d) Include content on materials and processes, focusing on the COGS side of the profit equation. One of the differentiating aspects of this program is its position between design and business, and we are confident the LCB will do an excellent job on the market research (revenue) side. Very few business schools, however, do a good job teaching the engineering aspects of materials and process choices and costing, yet this will be central to the success of any new product project in the physical world.
- e) Consider rolling a systematic approach to decisions under risk into the new product “funnel” of ideation and convergence.
- f) If teams retain ownership of new product lines after launch, they need to be prepared for crises and crisis communication management. That is, they need to be prepared for the inevitable crises like a high profile recall or a problem at the supply factory, and to know how they will devise and communicate recovery plans to the team, company and external world.
- g) One possibility that the core team has probably already considered is collaborating with the Warsaw Center on a course on licensed product management.
- h) As the program grows, LCB and other stakeholders should develop a holistic vision for the portfolio of course offerings around the sports product space, for example building a menu of electives over time that (once the numbers are big enough to justify these) could delve into different facets of SPM.

Longer range, the program may consider part-time and/or evening offerings, leveraging existing faculty preparation and bringing in more students. There are many working professionals in the Portland area so this may be a large market.

We were also asked to comment on internships. We believe these are important parts of the program. If the expense and overhead are not prohibitive, there are advantages to making them mandatory, and formalized with faculty mentors working with industrial partners to manage the students’ summer experience.

One model is asking companies early in the new year to propose internship experiences that they would like to fill, and allowing students to bid on and interview for these summer positions. Then, students are mentored both internally within the company, and externally by the faculty member (a weekly one-hour phone call is typically sufficient) during the summer.

The advantages of a strong and formal internship program are the following. First, companies already (in our experience) highly value internships as a way to identify and screen potential employees. If companies need to “win” interns in a competitive fashion, they will adjust their proposals toward the leadership roles that the SPM program strives to prepare students for. Also, mentored internships can have significant organizational development benefits for LCB if research-active faculty mentor summer projects. This is a very efficient way for faculty to develop institutional knowledge in the sports product space, which leads into both practical insights useful in a classroom and new and interesting research problems that they may wish to pursue.

V. Metrics (How do we know if we are successful?)

The metrics listed in the documentation are:

- Placement in sports industry within 3 months of graduation
- Continued professional success of graduates
- Volume and quality of admissions applications
- Quality of applicants admitted to the program
- Domestic and international recognition of the program

The following might also be considered:

- Average starting salary
- Yield rate of admitted students (what % join the program?)
- Student satisfaction with program
- Involved faculty satisfaction with students and curriculum

We are not sure how “domestic and international recognition” of the program would be measured. Absent objective metrics, this criterion could be dropped.

VI. Other issues

One issue that should be wrestled with is who owns the IP for creative work done by students in the program?

Response to External Review Committee Report
11/14/14

I. Program mission and need (Should we do it?)

Report: Testimony in the reading materials suggests that industry demand side is robust (more on this below) for sports product design professionals.

Response: We are preparing sports product management professionals. These are the professionals who work with designers to create products. These positions are PLM (Product Line Managers), Merchandisers, Product Development Managers, Product Sales Managers, Product Costing, Material Managers, Innovation Managers, Sales Managers, Buyers, etc. From an industry survey of five global companies based in Portland, the HR directors estimated from 25%-60% of their employees would be classified in these jobs.

Report: The Report states that the 'participants enthusiastically supported the proposed SPM programs. No data was given to the committee that proves this claim.

Response: In Summer 2012, a needs assessment based on 100 personal interviews was conducted. This was followed up with 4 focus groups of roughly 80 industry professionals in Spring 2013. The results of these efforts fully and enthusiastically supported our efforts to move forward with SPM program development. Further support for the program can be inferred by the commitment of 36 industry executives to our SPM Advisory Board, having served on our board for one year.

Report: For example, can they secure commitments to sponsor internships, or commitments to sponsor or hire graduates?

Response: Emails from ChingLuh, Nike, Brooks, Underarmour and adidas are provided about their willingness to take interns from this program.

II. Resources and Complementary Assets (Can we do it?)

Report: We were informed that a pending major gift would allow the hiring of additional faculty for the SPM program, and that some professors may welcome the chance to teach an additional section of one of their current preps.

Response: We entered a competition by the University of Oregon for strategic investment. We were awarded \$140k recurring in AAA for a product design faculty member, as well as awarded both AAA and LCB \$150,000 for program development.

It is important to note that since our presentation to the Graduate Council, a gift has been confirmed at \$15 million from Rick Miller. A second gift, specific to the Innovation Lab and Innovation Retail Store, is being considered by a major UO donor for \$5-\$10 millions.

Report: We do recommend, however, that some longer-range planning take place to develop a 2- and 3-year plan for instructional support that maintains the appropriate mix of qualified and enthusiastic tenure-track and adjunct instructors.

Response: Long-run instructional support will be led by two-full time faculty to be hired specific for the SPM Portland program. For the SPM program in Portland, we also have teaching resources that include top UO faculty, faculty from Portland State University, Oregon State University, University of Portland, Western Oregon State University as well as many interested industry professionals with masters and doctoral degrees. And with the multidisciplinary background of our instructors, we can draw from a larger pool of instructors from product design, journalism and law. In addition, we intend to attract top visiting professors for various areas of instructional expertise.

Appendix A provided.

Report: Currently these facilities are well positioned to prototype fabric products, can support appearance modeling but not functional prototypes in footwear, and will need additional resources to prototype other equipment such as helmets or metal products. The staffing and maintenance of

fabrication spaces such as these can be very expensive, and we did not see any formal understanding for sharing costs and responsibilities.

Response: The External Review Committee saw the Innovation Lab in Phase 1. The reason we started the space this year before classes begin is to begin the process of building a space with the equipment, people well maintained for our incoming classes. We have expertise in Portland helping us, as well our partnership with AAA. This in combination with the funding, we will have a functioning lab by September 2015.

Report: We recommend that some thought be given to succession planning, so that the program can continue and thrive even if some members of the core team are no longer available.

Response: The External Review Committee didn't have a chance to meet our Sports Product instructors who teach in Eugene (John Notar and Steve Bence), our program consultants. (Merryn Roberts-Huntley, Elizabeth Brock, Lindsey Holts) and our workshop instructors. (Sue Parham, Darcy Winslow, Mike Wilskey, John McPhee, Ann Marie Lei). This is growing with individuals choosing to attend the OEMBA program in order to contribute to our program in the future. (e.g. Jessica Brandes- Nike, Marcus Smith-adidas) These resources as well as our 36-member Industry Advisory Board show we are building a strong team of talent who are supporting this program beyond our core team.

From the academic side, Jim Bean, Dennis Howard, Dale Morse, Roger Best and Helen Gernon have shown interest in teaching in this new program.

Report: The committee recommends that expectations be calibrated to an inaugural class of 10-15 very high quality students.

Response: We have a high level of confidence in our marketing efforts, once we can start to communicate to potential students. As this timeframe has been shortened for this first year, having this flexibility with the size of the first class may be needed. Without any formal program announcement or promotion, we have received considerable interest from prospective applicants from across the US, Europe, Asia and Latin America.

Report: IV. Curriculum (What should it look like?)

Response: The SPM Strategic Plan sent to the external review committee included a course-by-course, term-by-term outline of our courses and titles. In our opinion, this information was fully disclosed and presented as a multidisciplinary program.

a) Put financial accounting earlier in the program:

Response: During the LCB review of the program, we were asked to put this later in the program. We will work with LCB on this recommendation.

b) Have some, at least rudimentary, introduction to discounted cash flows.

Response: This is an important part of our Financial Accounting course offered in Spring Term- Year 1.

c) Add a course (or add material to an existing course) on managing creative projects.

Response: This is included in the Product Development and Product Design courses.

d) Include content on materials and processes, focusing on the COGS side of the profit equation.

Response: This is included in the Costing Accounting course, as the accounting research is done to create this new curriculum.

e) Systemic approach to decisions under risk into the new product 'funnel' of ideation and convergence.

Response: Included in the Product Design curriculum.

f) If teams retain ownership of new product lines after launch, they need to be prepared for crises and crisis communication management.

Response: This is to be included in our capstone courses and integrative project in Winter Term- Year 2.

g) One possibility that the core team has probably already considered is collaborating with the Warsaw Center on a course on licensed product management.

Response: This is an important part of the Warsaw curriculum and we work include it as it fits the evolving needs of the SPM masters program and SPM workshops.

h) As the program grows, LCB and other stakeholders should develop a holistic vision for the portfolio of course offerings around the sports product space, for example building a menu of electives over time that (once the numbers are big enough to justify these) could delve into different facets of SPM.

Response: With the new SPD Masters program planned, we can envision the need to add meaningful elective courses.

***Report:* Longer range, the program may consider part-time and/or evening offerings, leveraging existing faculty preparation and bringing in more students. There are many working professionals in the Portland area so this may be a large market.**

Response: We have considerable interest for an on-line program and are designing a 21-month on-line program. We are targeting Fall 2017 or 2018 to launch this new format to reach this global market more and extend program to a wider audience of students.

***Report:* We were also asked to comment on internships. We believe these are important parts of the program. If the expense and overhead are not prohibitive, there are advantages to making them mandatory and formalized with faculty mentors working with industrial partners to manage the students' summer experience.**

Response: We agree the work experience during the summer between term 3 and 5 is critical to the learning experience. We would keep the work experience highly recommended vs. required for several reasons:

- a) Companies will send employees to be students in the SPM program. These students will go back into their companies for their summer work experience.
- b) And, all companies will pay their interns. If we require internships, the students will be required to pay the university during their internships.

To fully integrate these internships into the masters program we plan to add a non-credit 3 Day 'Work Experience' workshop the week prior to the start of students' second program year. The students and their company sponsors will be responsible for reporting back to SPM faculty with a formal review of the prior preparation, knowledge integration and the future opportunities for engagement. As a non-credit course, this course would be highly recommended but not required.

VI. Other issues

***Report:* One issue that should be wrestled with is who owns the IP for creative work done by students in the program?**

Response: The University is currently working on guidelines to manage IP for creative work done by students. We have met with tech transfer people to begin this discussion. Andy Gerlund attended this meeting. If these guidelines aren't available by Fall 2015, we will use existing guidelines available at other Oregon universities. (e.g. OSU PhD students currently work with adidas.)



UNIVERSITY OF OREGON
Charles H. Lundquist College of Business

November 24, 2014

Professor Andy Berglund
Interim Dean Graduate School
University of Oregon

Dear Dean Berglund:

The Lundquist College of Business is prepared to deliver the Sports Product Management program in Portland beginning Fall, 2015. We have nine faculty searches under way at this time. Some of these will enable faculty support of this new program. Further, several veteran faculty are interested in helping launch this program, including Roger Best, Dale Morse and me. We are in the late stages of a formal search for the director of the program. As of yesterday we had 11 applicants. Once the director is in place, he/she will begin filling out the staff early next year. We will have the organization in place in ample time for the program to start. Further, this program will have administrative assistance from the Oregon Executive MBA staff that has operated in Portland for nearly three decades.

The business model for the program includes tuition from the university budget model (90% of the tuition is returned to the program) and income from a substantial endowment. That endowment currently stands at \$15 million. We anticipate that it will be over \$20 million well before the program opens. The documentation that the VPFA has reviewed the financials is that she signed off on the lease for the new Gerding Edlen building space at Couch and Naito. A thorough analysis was done at that time.

Sincerely,

James C. Bean
Senior Associate Dean for Academic Programs



June 17, 2014

MEMORANDUM

TO: Andy Berglund, Interim Dean, Graduate School
FROM: Frances Bronet, Dean, School of Architecture & Allied Arts
SUBJECT: MS in Sports Product Management

This memo attests that

1. The Product Design program in the School of Architecture and Allied Arts and its faculty are invested in the MS in Sports Product Management and are supportive of this degree.
2. Our classes in Product Design are able to accommodate the students from Sports Product Management.

OFFICE OF THE DEAN

105 Lawrence Hall, 5249 University of Oregon, Eugene OR 97403-5249

T 541-346-3631 F 541-346-3626 aaa.uoregon.edu



UNIVERSITY OF OREGON
School of Journalism and Communication

October 30, 2014

James C. Bean
Harry B. Miller Professor of Business
University of Oregon
Eugene, OR 97403

Dear Professor Bean:

This letter confirms that the School of Journalism and Communication enthusiastically supports the proposal for a master's program in Sports Product Management to be taught in Portland by the Lundquist College of Business. We are eager to collaborate with you and others as you refine the curriculum.

Specifically, we will work out an arrangement for fall term such that we teach a course in our Multimedia Journalism curriculum for your students. For instance, the course "Thinking Story," currently taught by Professor Peter Laufer, might be an appropriate one for your students fall term. The course is currently taught as a J610, but it will soon be under second review by the UO Curriculum Committee for a permanent number, J627. "Foundations of Multimedia Journalism," also J610 (to be reviewed soon for permanent status as J622), taught by Assistant Professor Wes Pope, is another possibility. In either case we will need to discuss the logistics of adding another section to accommodate two groups of students. We will also need to discuss the financial details.

We look forward to working with you on this exciting initiative.

Sincerely,

Julianne H. Newton
Edwin L. Artzt Interim Dean

Copy: Dr. Leslie Steeves, SOJC Senior Associate Dean for Academic Affairs
Mike Fancher, Interim Director, George S. Turnbull Portland Center
Wes Pope and Sung Park, Co-Directors, SOJC Multimedia Journalism Program

OFFICE OF THE DEAN

1275 University of Oregon, Eugene OR 97403-1275 T 541-346-2167 F 541-346-0682 <http://journalism.uoregon.edu>

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UNIVERSITY OF OREGON
Lundquist College of Business

June 18, 2014

Andy Berglund
Interim Dean
Graduate School
University of Oregon

Andy,

I am writing to express my support for the proposed MS program in Sports Product Management.

The original idea for a sports product initiative emerged out of strategic plans in the Warsaw Sports Marketing Center dating back almost a decade. In 2012, we again proposed to assess the market opportunity and develop a proposal to better support the industry cluster of sport product firms in Portland. The effort, spearheaded by Jim Bean, Emeritus Professor Roger Best and Industry expert Ellen Devlin led to the MS proposal for Portland currently being reviewed as well as new curricular initiatives within the Warsaw Center based in Eugene.

I'm thrilled to see the progress made to date and excited about the innovative and interdisciplinary program being proposed. Not only will this complement our existing sports business program at the Warsaw Center but it will help to elevate the University of Oregon as a world-class destination for sport-related study. I'm convinced this will help strengthen our ability to attract top graduate students and leverage our current strengths.

Please don't hesitate to contact me if there are any questions.

Regards,

Paul Swangard
Managing Director

JAMES H. WARSAW SPORTS MARKETING CENTER

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ACTG 612
MBA Financial Accounting Fall 2013
Tuesday/Thursday 12:00-1:20 Room 312 Lillis

Instructor: Michele C Henney, PhD, CPA, MS, CGMA
e-mail: mhenney@uoregon.edu

Office: Lillis 355A
Office Phone: (541) 346-3281

Office Hours: Monday – 10:30 – noon, Wednesday – 2 – 3:30pm and by appointment. I am usually in my office every day, and you are welcome to stop by any time. If you are planning on making a trip to campus just to see me (at a time other than my office hours) you should probably e-mail or call first to make sure I am available. If you have been attending class but are still falling behind you are encouraged to come in for extra help. These meetings will be much more productive if you come well prepared with specific questions.

Course Materials

1. **Required Texts:**

Financial Accounting 4th (or 3^d) Edition by Dyckman, Magee, Pfeiffer (Cambridge Business Publishers)
ISBN(13 digit): 978-1-934319-60-4.

Selected *Cases in Financial Reporting* by Engel, Hirst, McAnally (Cambridge Business Publishers) – you will access the cases we're using electronically. Here is the site: http://www.study.net/r_mat.asp?crs_id=30037206 . You will need to register at the site and pay for access to the materials. You can download the files as pdfs or as a e-reader file, or purchase a hard copy course pack. Let me know if you have any questions.

2. **Blackboard course website:** The website will have up-to-date course information as well as class notes and assignments. I will also use Blackboard to communicate with you via announcements and email.

Course Objective: An understanding of how financial accounting information is prepared and reported is one of the fundamental building blocks of a business education. This course is designed to assist you in developing an understanding of financial accounting concepts and techniques so you can be an effective and informed user of financial statement information. In the course you will learn to:

- apply accounting rules to reflect underlying economic transactions;
- understand how differences in measurement rules affect financial statements;
- understand how manager judgment influences financial statements; and
- analyze financial statements to make business decisions.

Grading: Grades for the quarter will be based on two exams, assigned cases, and my assessment of your class preparation/participation. The points are as follows:

	<u>Points</u>
Midterm Exam	125
Final Exam	150
Assigned cases	110
Homework	80
Preparation/Participation	<u>50</u>
Total	515

Exams: The midterm exam covers material through session 8 (statement of cash flows, chapter 4 in your text). The final exam will focus on the post-midterm material; however, the post-midterm material relies heavily on the pre-midterm material. I will talk more about the exam form and content in class.

Assigned Cases: The cases will be completed as follows:

- a) Three cases of your choice to be done individually – worth 20 points each.
- b) The final case, Kohl's and Dillard's to be done in the same group you have for your marketing and management courses. This capstone case is worth 50 points.

All students must read all cases and be prepared to participate in class the day the case is due. The deadline for submitting each case is the start of class on which it is due. Each case will be graded as follows out of points possible:

- 0% (not turned in)
- 20% (mostly incorrect and/or incomplete),
- 40-60% (some significant errors, but a legitimate attempt to complete)
- 70-90% (some errors, but a legitimate attempt to complete)
- 100% (minor errors or no errors)

<u>Assigned Cases – Fall 2013</u>	<u>Due Date</u>
General Mills (parts a-j)	Thursday, Oct 3
Rocky Mountain (parts a-d)	Thursday, Oct. 10
Rocky Mountain (parts e-k)	Thursday, Oct. 17
Weis Markets (Statement of Cash Flows)	Tuesday, Oct 29
State Street	Wednesday, Nov. 27
Kohl's and Dillard's*	Thursday, Dec 5

*This case is a comprehensive case involving financial statement analysis, which will be introduced in Chapter 5. You can begin working on this case as we cover individual topics throughout the second half of the course.

Preparation/Participation: For the material covered in this course, the most efficient use of class time is reinforcing or clarifying what you have tried to learn on an individual (or group) basis before entering the classroom. You should prepare for each class by studying the assigned chapters, reviewing and solving cases and suggested problems, and discussing these materials in your study groups. During class, I will emphasize the most important points and facilitate class discussion. After class you should review any areas in which you still feel weak and then see me if you have unresolved questions.

Your success in this course depends on your adequate preparation for class and active participation during class. I have allocated 50 of your total course points to your preparation and participation. You can earn these points by coming to class prepared and asking clarifying questions, or making relevant comments about the material being covered. I recognize that you have varying backgrounds and degrees of exposure to accounting, which may affect how comfortable you are speaking up in class.

Homework: To be successful in this course you must also practice applying the concepts to a variety of situations. I have assigned homework to help you practice. You will need to submit 8 of the assignments – there are 10 to choose from. To receive credit, you must submit the problems via Blackboard (or bring a hard copy to my office) before the end of the week (i.e. Friday at 5pm) in which the problems are assigned. For example, chapter 1 problems would need to be submitted by 5pm on Friday, Oct 4 to receive credit. You will receive a maximum of 10 points for each assignment that you submit before the specified deadline and the points will be assigned as described above with the cases.

Administrative Policies

(1) Commitment expected in hours: For a three credit graduate course, it is expected that you will need to commit (on average) a minimum of 2 hours to outside work for each hour of class time (i.e., 6 hours per week). This will vary from week to week depending on whether an exam is scheduled or a case is due.

(2) Make-ups and late work: If you will be unable to meet any deadline (exam date or due date for assignments), I ask that you notify as soon as possible. I will interpret your absence, without prior notice, as an indication that you wish to take a score of zero on the assignment/exam. I'm more than willing to work with you to accommodate genuine needs/emergencies with alternative arrangements, but I expect you to do your part too.

(3) Adds, drops, and incompletes: I follow the University of Oregon's and the Lundquist College of Business's guidelines as to the granting of add, drops, and incompletes.

(4) Scholastic dishonesty: **PLEASE READ THIS SECTION CAREFULLY.** Any time you put your name on a piece of work for this course, you are asserting that it is your OWN work, except as indicated and permitted. This means that you should not copy phrases or sentences directly from sources but you should read the material and then put it into YOUR OWN words. You may feel as if the authors have said it much better than you ever could but that is not the point; the point is that if you can read for understanding then you can explain the issue to me in your words. This shows me that you truly do understand, rather than having the ability to select and repeat someone else's words without understanding. If you choose to use a sentence here or there in your paper (not whole paragraphs or lots of sentences) that are directly copied from some source, it is all right as long as you cite the source and the location in a footnote. All information that is not common knowledge must be cited. Lifting words and/or phrases directly from the source material is almost always obvious and tends to disrupt the normal flow of your presentation. If you copy and do not cite, it is scholastic dishonesty and under the UO's rules, I am required to submit any evidence of scholastic dishonesty to the UO Internal Affairs Committee for a judgment. If you are uncertain about the format of required papers, the Chicago Book of Style, Strunk and White's *Elements of Style*, or the MLA Style Handbook will provide the necessary guidance.

(5) Inclement Weather Policy: In the instance that the University does not close during a period of inclement weather, but conditions are such that traveling may be difficult, I will post on Blackboard whether I will be holding class that day by 8 am. In the interest of safety and fairness, exams, quizzes and assignments due on that day will be postponed until the next class meeting regardless of class being cancelled or class being held. I will provide notes and assistance for material covered that day in the event that class is held on those days, but you feel it is not safe to travel to campus.

Notice to people with disabilities: This syllabus and all other course materials are available in alternative formats upon request. Additional services may also be available through the Office of Disability Services (556-8387). To request materials in alternative formats or to discuss any concern you may have about participation in this course, please get in touch with me.

ACCOUNTING 612 – Financial Accounting
Tentative Course Schedule – Fall 2013

Class	Date	Case Preparation	Reading	Topic(s)	Suggested Problems
1	T 10/1	General Mills (parts a-e)	Ch. 1	Introducing Financial Accounting	E1-27, E1-28, E1-30, <u>P1-36</u> , <u>P1-40</u>
2	TH 10/3	General Mills (parts f-j) Write-up Due	Ch. 2	Constructing Financial Statements	
3	T 10/8		Ch. 2		E2-42, P2-55, P2-56, E2-32, E2-34, <u>E2-39</u> , P2-47
4	TH 10/10	Rocky Mountain (parts a-d) Write-up Due	Ch. 2, 3		
5	T 10/15		Ch. 3	Adjusting Accounts for Financial Statements	E3-31, E3-32, E3-35, <u>E3-38</u> , P3-47, P3-50
6	TH 10/17	Rocky Mountain (parts e-k) Write-up Due	Ch. 3		
7	T 10/22		Ch. 4	Reporting and Analyzing Cash Flows	<u>E4-34</u> , E4-35, <u>E4-38</u> , P4-45, P4-50
8	TH 10/24	Catch-up Day			
9	T 10/29	Weis Markets – Statement of Cash Flows Write-up Due	Ch. 4		
10	TH 10/31			Midterm Exam	
11	T 11/5		Ch. 5	Analyzing and Interpreting Financial Statements	<u>E5-25</u>, <u>E5-29</u>
12	TH 11/7	Apple Inc. (for discussion)	Ch. 6	Revenue and Receivables	<u>E6-26</u>, <u>E6-33</u>, <u>E6-37</u>, <u>E6-39</u>, P6-43
13	T 11/12		Ch. 7	Inventory	E7-26, <u>E7-29</u> , E7-28
14	TH 11/14		Ch. 7, 12	Reporting and Analyzing Intercompany Investments	
15	T 11/19		Ch. 12		E12-24, M12-15, E12-31
16	TH 11/21		Ch. 8	Reporting and Analyzing Long-term Operating Assets	E8-22, E8-26, <u>E8-30</u> , E8-31, E8-35
17	T 11/26	State Street (you may submit before 5pm on 11/27)	Ch. 8, 10	Reporting and Analyzing Leases (pp. 435-446)	<u>E10-25</u> , <u>E10-26</u>
	TH 11/28			Happy Thanksgiving!	
18	T 12/3		Ch. 9	Reporting and Analyzing Liabilities	E9-36, E9-41, E9-39, E9-43
19	TH 12/5	Kohl's and Dillard's Write-up Due	Ch. 9		
Tuesday, Dec. 10 – 8:00 a.m.				Final Exam	

Strategic Cost Management
Accounting 662
Winter, 2012

Introduction

Strategic Cost Management is an advanced graduate class melding strategic issues, mathematical models, and management accounting. The course will use many cases and emphasize decision-making in a complex and ambiguous environment. Students should be in either the Master of Accounting Program or have taken a management accounting course in the MBA Program.

Expectations and Grading

Grades will be determined based on the following percentages:

Final case write-up	10%
First midterm	20%
Second midterm	20%
Team projects	
Case Write-ups (3x3%)	9%
Balanced Scorecard Project	10%
Technical paper summary	5%
Spreadsheet problems (7x3%)	21%
Participation	5%

Preparation for class is extremely important. I will be cold-calling on students for case discussion.

I will choose three-person teams. The teams will have five assignments: 3 case write-ups, a technical paper summary, and a balanced scorecard of a local company. Each member of the team will make or share in one presentation to the class (technical paper review and the balanced scorecard). Presentations will be a maximum of 5 minutes. The written assignments, not the presentations, will be graded so other group members will not be penalized by the presentation ability of its members. I will try to give personal feedback on presentations. Individual grades of team projects will be influenced by peer evaluations from other team members.

The cases are on blackboard. The readings are available through the library's e-reserve system. The technical papers can either be copied from the journals in the library or journals in my office.

Case write-ups should be in business memo format (one page with attached tables, clear headings, white spaces, easy to read) with a clear introductory paragraph with decision on what the company should do, justification in the body of the memo, and a call to action in summary. Case write-ups are due the day the case will be discussed in class.

The technical paper (5-8 pages) and presentation will be based on an assigned research paper. The paper should critically review the paper, identifying both good and poor aspects. The paper should also discuss any real-world applications of the research. The presentation will serve as background material for the conceptual discussion of the topic in class. The paper will be due on the presentation date.

Each team will be expected to create a balanced scorecard for a local business or business unit. The balanced scorecard presentations and paper should be based on discussions with officers of a local business. The presentations and papers will be due the last two days of class. In preparation for this project you should read the Kaplan and Norton article.

The spreadsheet problems are either from cases or created by me. Templates for most of the spreadsheet problems will be provided. Each is worth 3% and can be done in groups of your choice of 3 or less. They should be e-mailed to me as attachments. Three points will be given for each if done right the first time and two points if done wrong but appropriately corrected.

Books

There are no books for the class.

Readings will be based on journal articles on either e-reserve at the library or web-sites. In general, the Journal of Cost Management (JCM) is a good journal for background reading in class. There are also many websites that can serve as background reading.

Communications

My office hours during winter term will be 10 - 11:30 AM on Tuesday and Thursday and 8-12 Wednesday. You can often find me in my office at other times, so feel free to drop in. I am located in 377 Lillis. My telephone is 346-3342 and my e-mail address is dmorse@uoregon.edu.

Code of Professional Business Conduct

A Statement of Values

The Lundquist College of Business learning community is committed to a set of core values that guide our interactions with one another. Our values are as important within our LCB community as within the business community. Our values help define both how we aspire to act and what it means to be a business professional.

INTEGRITY

Members of our community act with integrity and honesty. These qualities are essential in providing a basis for trust and go to the core of what is expected from business professionals.

RESPECT

Our community conveys respect for the dignity of all people. Our relationships are based on mutual respect. Differences of opinion are discussed openly and civilly. These discussions focus on issues and are presented in a courteous manner. We are sensitive to the impacts of both our words and actions on others.

OPENNESS

We encourage all members of our community to exchange ideas freely within the bounds of reasonable behavior. We recognize that learning requires an open environment.

RESPONSIBILITY

We act publicly and accept responsibility for our actions. We understand that the community will keep us accountable for our dealings. We deliver on the commitments and promises we make to others.

TEAMWORK

Our community is stronger when we work as a team. We foster attitudes encouraging members of the community to give and receive constructive criticism, and develop creative solutions to challenges.

Schedule

Date	Topic	Cases and Problems
1/10	Introduction and Review Readings: http://www.quickmba.com/strategy/porter.shtml http://www.quickmba.com/strategy/competitive-advantage/ http://www.quickmba.com/strategy/swot/ http://www.quickmba.com/strategy/generic.shtml	
1/12	Fixed /Variable Costs & Breakeven	Martin Music (blackboard)
1/17	Product Mix/Linear Programming Reading: http://www.isye.gatech.edu/~spyros/LP/node1.html#SECTION00010000000000000000 Product mix problem in Blackboard done in class	Breakeven problem (spreadsheet, blackboard)
1/19	TOC/Optimizing Distribution http://www.leanproduction.com/theory-of-constraints.html Optional readings: Articles on the Theory of Constraints in <i>JCM</i> , Jan/Feb, 1997	Sabbatical Marine (blackboard) (spreadsheet problem)

- 1/24 **Capacity Decisions** Distribution Problem
Optional readings: (spreadsheet problem)
Articles on capacity in *JCM*, Spring, 1994.1/13
- 1/26 **ABC/Product Costs** Sports Management Training (blackboard)
Capacity decision problem
(spreadsheet, blackboard)
<http://www.managerialaccounting.org/Activity%20Based%20Costing.htm>
<http://hbswk.hbs.edu/item/4587.html>
Technical paper: Kennedy, T. and Affleck-Graves, J., "The Impact of Activity-Based Costing Techniques on Firm Performance," *JMAR*, 2001.
- 1/31 **Customer Profitability** Allied Office Products (blackboard)
Readings:
"Customer Profitability Analysis: Challenges and New Directions," Foster, Gupta, and Sjoblom, *JCM*, Spring, 1996. Summary at
<http://maaw.info/ArticleSummaries/ArtSumFosterGuptaSjoblom96.htm>
- 2/2 **ABM/Value Chain Analysis** Chalice Wines (blackboard)
Readings:
"Value Chain Analysis: A Strategic Approach to Cost Management", Donelan and Kaplan, *JCM*, March/April, 1998. Summary at
<http://maaw.info/ArticleSummaries/ArtSumDonelanKaplan98.htm>
<http://www.coursework4you.co.uk/essays-and-dissertations/value-chain-analysis.php>
Optional Readings:
"Strategic Cost Management and the Value Chain", Shank and Govindarajan, *JCM*, Winter, 1992
"Lean Manufacturing Principles and Their Applications", *JCM*, May/June 2008.
Articles on ABM in *JCM*, Summer, 1992
- 2/7 **TQM and Quality Costs**
Readings:
<http://logistics.about.com/od/qualityinthesupplychain/a/TQM.htm>
Technical Paper: Nagar, V. and M. Rajan, "The Revenue Implications of Financial and Operational Measures of Product Quality," *AR*, October 2001.
- 2/9 **First Midterm**
- 2//14 **Environmental Cost Management** Multipaint (blackboard)
Reading:
http://www.ecological-economics.org/pages/environmental_cost_accounting.pdf
Technical paper: Clarkson, Li, Richardson, "The Market Valuation of Environmental Capital Expenditures by Pulp and Paper Companies", *AR*, 2004
- 2/16 **JIT**

<http://personal.ashland.edu/~rjacobs/m503jit.html>

Technical Paper:

Maiga, A. and F. Jacobs, "Assessing JIT Performance: An Econometric Approach", JMAR, 2008.

- 2/21 **Compensation/Agency Theory** Blue Hose Manufacturing (blackboard)
Reading: JIT spreadsheet assignment
<http://www.h-net.org/~business/bhcweb/publications/BEHprint/v027n2/p0486-p0499.pdf>

Technical Papers:

Leone, A., "The Relation between Efficient Risk-sharing Arrangements and Firm Characteristics: Evidence from the Managed Care Industry," JMAR, 2002.

Campbell, D., S. Datar, and T. Sandino, "Organizational Design and Control across Multiple Markets: The Case of Franchising in the Convenience Store Industry", AR, Vol 84, No 6, 2009.

Matsumura, Shin, "An Empirical Analysis of an Incentive Plan with Relative Performance Measures: Evidence from a Postal Service", AR 2006

- 2/23 **Transfer Pricing** Berlin Toyota (blackboard)
<http://classes.bus.oregonstate.edu/spring-07/ba422/Management%20Accounting%20Chapter%2023.htm>

Technical Papers:

Cools, M. and R. Slagmulder, "Tax-Compliant Transfer Pricing and Responsibility Accounting", JMAR, 209.

- 2/28 **Capital Investment in Technology** Energy Direct's Proposed Wind Farm
(blackboard) Spreadsheet assignment

- 3/1 **Master Budget** Freda Fragrance (blackboard)
Spreadsheet assignment

Technical Papers:

Webb, A., S. Jeffrey, and A. Schulz, "Factors Affecting Goal Difficulty and Performance When Employees Select Their Own Performance Goals: Evidence from the Field", JMAR, 2010.

Balakrishnan, R., N. Soderstrom, T. West, "Spending Patterns with Lapsing Budgets: Evidence from U.S. Army Hospitals", JMAR 2007.

- 3/6 **Second midterm**

- 3/8 **Balanced Scorecard**

Reading:

"Transforming the Balanced Scorecard from Performance Measurement to Strategic Management: Part I" by Robert Kaplan and David Norton,

<http://www.allbusiness.com/management/benchmarking-quality-improvement/788985-1.html>

Technical Papers:

Ittner, C., D. Larcker, and M. Meyer, "Subjectivity and the Weighting of Performance Measures: Evidence from a Balanced Scorecard", AR, July , 2003.

Bryant, L., D. Jones, and S. Widener, "Managing Value Creation within the Firm: An Examination of Multiple Performance Measures", JMAR, 2004.

Banker, Potter, Srinivasan

Hoque, James, "Linking Balanced Scorecard Measures to Size and Market Factors: Impact on Organizational Performance, JMAR, 2000

3/13 and 3/15 **Balanced Scorecard Presentations**

Final Case Write-up Due Finals Week

COURSE SYLLABUS

Office: 468 Lillis
Telephone: 346-5137

Office Hours: Tue, 2:00 – 3:00 p.m. or by appointment
Email: nmurthy@uoregon.edu

REQUIRED TEXT: Customized Text, Adapted from "Supply Chain Management: Strategy, Planning, and Operation", Sunil Chopra and Peter Meindl, Prentice Hall, 4th Edition.

COURSE PACKET: The course packet contains case and reading articles.

SUPPLY CHAIN GAME (SIMULATION): Access Code to participate in this web-enabled competitive supply chain game must be purchased at the UO Bookstore.

EXPERIENTIAL LEARNING: Tentative Field Project Sponsors: Myers Container, Shady Peeps, NextStep, Ninkasi Brewing Company, Visionary Lenses, and Skookum (Ulven Company).

COURSE OBJECTIVES: A combination of experiential learning, cases, reading articles in academic and practitioner journals, text book chapters, guest speakers, and business simulations will be used to discuss strategic and tactical issues that are critical for efficient and effective design and operation of supply chains. Students will be exposed to frameworks and qualitative/quantitative tools to aid decision-making in supply chain management. The sessions are designed to promote student participation through the discussion of current events in the business world as they relate to supply chain management issues.

Over the last two decades, factors such as a high rate of technological change, increasingly dynamic and fragmented markets, and global competition have changed the very nature of doing business in many industries. There is an increased pressure to develop the right products quickly, and produce and deliver them in an efficient and effective manner. The competition between major manufacturers has been elevated to competition between the overall supply chains of these firms. Many domestic and foreign firms have demonstrated that supply chain management can be an effective competitive weapon. In conjunction with well conceived marketing and financial plans, these firms have made major penetrations into markets worldwide. The specific objectives include:

- To understand the role of supply chain management in the overall business strategy of a firm.
- To understand the strategic and tactical linkages between supply chain management and functional areas of a firm.
- To identify and evaluate comparative approaches to supply chain management in an international context.
- To identify and evaluate a range of tools appropriate for analysis of supply chain management practices at a firm.
- To gain a first hand understanding of a holistic, interdisciplinary, behavioral, and team-based perspective required to engage in problem solving projects in supply chain management (**learning by doing**).

EVALUATION

Midterm 1	20.0%
Midterm II	20.0%
Supply Chain Simulation Game (Group)	20.0%
Group Assignments Using Excel Solver	5.0%
Individual Assignment #1 Using Excel Solver	5.0%
Individual Assignment #2 on Forecasting	5.0%
Field Project	15.0%
Class Participation	10.0%

Class Participation: Students are expected to complete the reading assignments before the start of a lecture. Regular attendance is an important requirement, although not sufficient to score well on class participation. In addition to attending regularly, students are expected to participate in a constructive and fruitful manner during lectures and case discussions. Along with being responsible for reading the materials assigned in the syllabus, from time to time, students will be provided short articles from Wall Street Journal, Business Week, Fortune, Forbes, Business 2.0 and other relevant outlets. They may be handed out a class period in advance or on the day when the article is being discussed. In the latter case, students will be provided 5-7 minutes to read the short news item or article and discuss the issues related to supply chain management.

Attending classes regularly and keeping up with readings and homework is essential to learning and performing well in this course. In addition to understanding the core concepts in supply chain management, students are expected to develop an appreciation for the importance and relevance of these concepts to ones functional area of business interest. Students are strongly encouraged to read business articles related to the course and ask questions that help them understand how supply chain management issues in the articles influence the decision making and performance in ones business area of interest.

Students who have poor attendance record should expect class participation scores as low as 3 percentage points out of 10. Class participation score resulting from active class participation with a poor attendance record will be capped at 5 out of 10. Students with exemplary attendance but with poor class participation should expect a score of 6 out of 10. Students who participate actively along with a good attendance should expect a score of 8.5 or above as per performance. Students can boost their class participation score by getting 0.5 percentage points for attending a plant tour or a talk by a guest speaker that is scheduled by the instructor. Additional talks (not organized by the instructor) may be announced for which extra credit will be offered towards class participation. Note that plant tours have limited slots and are available on a first come first serve basis. There is penalty (of 0.5) for being a no-show once having signed up for a tour, since the slot could have been used by another interested student, had the student cancelled out well in advance. Students can also earn 0.25 percentage point for reading and summarizing key supply chain management issues in a current article in a business magazine. Students are only permitted to submit one article per week (due latest by the end of that week). One is not allowed to submit an article towards a week that has passed by. As per the grading policy, at the end of all accumulation, a student's overall class participation score will be capped at 10 percentage points. Additional opportunities for extra credit may be announced in class.

Supply Chain Game (Competitive Simulation): Students will compete as teams on two assignments in this game. Each student is required to be registered on the web for this game using ones individual access code purchased at the UO Bookstore. Each student must register as a member of ones assigned team. One cannot register after the game has started. **Registering and participating in the game is a must to get any credit for this component.** Please keep in mind that the bookstore has a non-return policy on these access codes in case you plan to withdraw from this class.

Students can register their teams at <http://sc.responsive.net/sc/oregon/start.html>. To register, they need BOTH the code they purchase from the bookstore and the course code 'demand'. Students can access a description of the first assignment at <http://sc.responsive.net/sc/oregon/Assign1> and the second assignment at <http://sc.responsive.net/sc/oregon/Assign2>.

Once the simulation begins, students can access the teams they registered at <http://sc.responsive.net/sc/oregon/entry.html>.

Students are strongly encouraged to read the instructions to play this game, understand the specifics of the assignments, and have thought through their game plan prior to the commencement of the game. The ability to tie-in basic principles in operations and supply chain management with the scenarios in this game is critical for success in this game.

Field Project: Each group will be assigned a sponsored field project. These field projects tend to focus on some problem solving situation in the supply chains at the sponsoring firms. These projects are intended to both complement and supplement the concepts and techniques introduced in the class (learning by doing). This is a professional engagement with firms that is generally championed by senior management at these firms. Students are expected to use a combination of 2 -3 site visits, conference calls, emails, and archival data to address the assigned problem. A smart division of labor is expected amongst team members to work around capacity constraints due to class schedules and sponsor's availability. Each team may be asked to sign a confidentiality agreement with their sponsor and must be cognizant about safeguarding information or sensitive data that is for that team only for the duration of the project. Each group is expected to follow the timeline for key milestones outlined in the syllabus. **The instructor should be kept in the loop on all key communication with the sponsor during the project.**

Case Analysis: The *Frito Lay* case will be analyzed as a group. The analysis should specifically address the questions assigned by the instructor. **Each group will prepare 8-10 presentations slides for the case as appropriate.** However, based on a random assignment, at most two groups will be called upon to make a 10 – 15 minutes presentation of their analysis, to kick off ensuing class discussion. In order to demonstrate their preparation, each group will turn in a copy of their slides.

Peer evaluations may be administered up to twice during the term (if deemed necessary based on feedback from team members), once in the middle and once at the end to ensure that everyone is contributing their fair share on all group assignments.

TENTATIVE COURSE OUTLINE

Additional Plant Tours and Industry Guest Speakers (To be announced)

4/2 *Introduction to Supply Chain Management*

4/4 *Understanding the Supply Chain*

Required Reading: Textbook, Chapter 1

- "What is the Right Supply Chain for Your Product?" M. Fisher, HBR.
- "The Power of Virtual Integration: An Interview with Dell Computer's Michael Dell," HBR.

4/9 Introduction to Linear and Integer Programming for Facilitating Decision Making in Operations and Supply Chains

4/11 Linear and Integer Programming (Continued)

Optimizing Supply Chain Decisions Using Excel Solver

- 4/16 *Supply Chain Performance: Achieving Strategic Fit and Scope*
Required Reading: Textbook, Chapter 2
- 4/18 **No Lecture:** (in lieu of Plant Tours and Guest Speakers on several evenings; advance field project and individual learning on optimization)
 - **Due: Group Assignment on using Excel Solver (soft copy via email). Hard copy to be slipped under the office door (468 Lillis)**
- 4/23 **No Lecture:** (class rescheduled to Tue, 5/1/12, 6:00 – 7:00 p.m., 162 Lillis)
 - **Due (via email): A write-up (1-2 pages) on the term project (problem description, scope, objectives, proposed solution methodology, and work accomplished)**
- 4/25 *Supply Chain Drivers and Metrics*
Required Reading: Textbook, Chapter 3
Required Reading: Article
 - "The Pain in the (Supply) Chain," J. Butman, HBR.
 - **Supply Chain Game: Round 1 begins at 6:00 p.m.**
- 4/30 *Designing Distribution Networks and Applications to e-Business*
Required Reading: Textbook, Chapter 4
 - **Due: Individual Assignment on using Excel Solver (soft copy via email). Hard copy to be provided in class.**
- 5/1 **Rescheduled Class:** *Designing Distribution Networks and Applications to e-Business*, 6:00 – 7:00 p.m. in 162 Lillis
Midterm 1 Review, 7:00 – 8:00 p.m., 162 Lillis
- 5/2 **Midterm I** (In-class component plus take-home)
Take Home Exam on Optimization (Problem Solving) using Excel Solver is due on 5/3 by 5:00 p.m.
 - **Supply Chain Game: Round 1 ends at 6:00 p.m.**
- 5/7 *Network Design in the Supply Chain*
Required Reading: Textbook, Chapter 5
 - **Due: Supply Chain Game Write-up for Round 1**
- 5/9 *Demand Forecasting in a Supply Chain*
Required Reading: Textbook, Chapter 7
 - **Due: An interim version of the project report (should have at least 30% of the overall objectives accomplished)**
 - **Supply Chain Game: Round 2 begins at 6:00 p.m.**
- 5/11 Plant Tour of Ninkasi Brewing Company, 10:00 – 11:00 a.m. The tour will be limited to 12 students from this class on a first-come first-serve basis.
- 5/11 Plant Tour of Pre-Tec (Flexible and Customized Automation Using Robotics), 2:00 – 3:30 p.m. The tour will be limited to 12 students from this class on a first-come first-serve basis.
- 5/14 *Demand Forecasting in a Supply Chain (continued)*
Required Reading: Textbook, Chapter 7
- 5/15 **Guest Speaker**, Jeff Knowlton, VP, Datalogic Scanning, Supply Chain Management and ERP Systems, 6:00 – 7:15 p.m., 162 Lillis

- 5/16 *Demand Forecasting in a Supply Chain (continued)*
 Required Reading: Textbook, Chapter 7
Transportation in a Supply Chain
 Required Reading: Textbook, Chapter 11
- **Supply Chain Game: Round 2 ends at 6:00 p.m.**
- Required Reading: Article
- Note on the U.S. Freight Transportation Industry, HBS
 - **Case: Frito Lay: The Backhaul Decision** (for class discussion, presentation slides due, no write-up required)
- 5/21 *Transportation in a Supply Chain (continued)*
 Required Reading: Textbook, Chapter 11
Sourcing Decisions in a Supply Chain
 Required Reading: Textbook, Chapter 12
- **Due: Supply Chain Game Write-up for Round 2**
 - **Due: Individual Assignment #2 on forecasting**
- 5/21 **Midterm II Review, 7:00 – 8:00 p.m., 162 L111s**
- 5/23 **Midterm II (In-class component plus take home case)**
Take Home Case Is due on 5/25 by 5:00 p.m.
- 5/28 Memorial Day Holiday
- 5/30 *Sourcing Decisions in a Supply Chain*
 Required Reading: Textbook, Chapter 12
 Required Reading:
- "A Smarter Way to Buy," Z. Degraeve and F. Roodhooft, HBR.
 - "Competing for Supply: A Conversation with Bryan Stolle," HBR.
 - "Aligning Incentives in Supply Chains," V. G. Narayanan and A. Raman, HBR.
 - "Turning the Supply Chain into a Revenue Chain", G. P. Cachon and M. A. Lariviere, HBR.
- 6/4 In-Class Presentations
- 6/6 In-Class Presentations
- 6/11 **Field Project Report is due to the instructor by 6:00 p.m. (hard and soft copy of the final report and presentation slides). A hard and soft copy of the final report and presentation slides should also be provided to the project sponsor.**

U N I V E R S I T Y o f O R E G O N

Charles H. Lundquist College of Business

MGMT 614, Strategic Management
Spring 2013

Instructor: Arvids A. Ziedonis

Date: 03\04\13

Version 0.3

Subject to Change

Class Location: 232 Lillis

Meeting Times: M,W 8:00–9:50

Office: 482 Lillis

e-mail: aaz@uoregon.edu

Phone: 346–3318

Office Hours: W, 3:00–5:00 and by appointment

Course Scope and Mission: This course develops concepts and analytical techniques for creating sustainable advantage in competitive environments. The perspective adopted is that of the general manager who has overall responsibility for the performance of the firm or of a business unit within the firm. Such a manager must understand the basis for the current performance of the firm and to identify those changes (inside or outside the company) that are most likely to affect future performance or that provide opportunities for the firm to improve its performance. The manager must then use the firms resources to formulate and implement strategies to compete successfully in its environment. The strategy must define the scope of the firm’s essential activities, the logic through which the activities result in better performance, and the factors that allow the firm to carry out those activities better than its competitors.

The complexity of today’s (and tomorrow’s) competitive environment dictates that strategy cannot be the domain of top managers alone. In particular, functional specialists and mid-level managers will be challenged increasingly to think strategically when confronting day-to-day issues, and to ground strategic contributions in

the operational realities of the business. One of the broader objectives of this course is to increase your ability to take the initiative and assume more of a leadership role in your company. One way to do this is through cultivating the ability to make well-grounded and insightful recommendations on how the business actually can compete more effectively. Understanding corporate strategy is not only important for internal effectiveness and efficiency, it is also important for external consultants, auditors, financial analysts, and bankers trying to understand and value other firms.

Format: To capture the pragmatic, action-oriented nature of the general manager's job and the complexity of the general manager's situation, this course is taught primarily through the case method. We will supplement case discussions with readings, lectures, conceptual analyses and group work within class. A central goal is for you to develop your own personal synthesis and approach for identifying and solving key strategic problems facing a business. The class also should help you see relationships between the various functional area courses (e.g., marketing, accounting, finance) you have taken in the MBA program.

For each class session there is a required reading or a case (and sometimes both). You are expected to have read these prior to class.

My role in this course is to expand on our readings in the form of lectures at the beginning or end of class to deepen your knowledge of individual tools or frameworks. I will also endeavor to bring challenging questions before the group and to familiarize you with the theories and tools of the strategy field that are useful in addressing these issues. During case discussions, I will act as a moderator and occasionally as a devil's advocate as the discussion moves forward to make sure that key issues are brought up in the discussion. To ensure that the class is highly interactive, I ask that you bring your name card to each class meeting. In addition, to help me learn everyone's names, I will distribute a class seating chart at the second class meeting. Please sit in your chosen seat throughout the term.

IMPORTANT-EXTENDED CLASS TIME: Class will meet from 8:00-9:50 instead of the 8:00-9:20 period listed on the course registration site. There are two reasons for the class meeting length. First, because many of the topics and case discussions cannot be adequately covered in an eighty-minute session, we will meet for one hundred and ten minutes with a ten minute break. Second, the longer class time will permit us to cover the material in fewer class sessions, effectively ending the course a week early. Because the quarter system puts many of you with internship opportunities at a disadvantage due to the later end of the school year, finishing the course by Memorial Day will mitigate disruption of studies for those wishing to leave campus early.

Materials:

Textbook: Contemporary Strategy Analysis, 8th Edition, by Robert M. Grant (Blackwell Business Publishers, 2010) is available from the Duck Store and on-line book retailers. *Be sure to purchase the 8th edition.*

Course Reader: A Course Reader with required cases and readings is available from the Duck Store. For Weeks 1–2, all required material will be posted on Blackboard in the Lectures & Readings folder.

Simulation: In class 3A we will be conducting an in-class strategy simulation on competition and cooperation. You are required to purchase access to the simulation (\$12.50) prior to the class on April 15 from the Harvard Business School Publishing website created for this course:

<https://cb.hbsp.harvard.edu/cbmp/access/18730065>.

Reserve Materials: The textbook and two copies of the Course Reader will be placed on reserve at the Knight library.

For those of you interested in exploring strategy outside of the course, I recommend two books that are interesting and readable:

Thinking Strategically by Avinash K. Dixit and Barry Nalebuff (W. W. Norton) 1991.

Information Rules by Carl Shapiro and Hal R. Varian (HBS Press) 1999.

Expectations:

- 1 WARNING—MGMT 614 is fast-paced and reading and writing-intensive. The workload will be particularly heavy leading up to first quiz and interim report deadline (weeks 4 and 5) and Weeks 8 and 9 (final report deadlines and Quiz #2).
- 2 Class time will be devoted to lecture, case discussion, exercises, and group work. Sometimes the material we cover will be new and difficult. Other times, it will refresh concepts from prior courses. Regardless, getting behind is a recipe for disaster. Stay on top of the course material and assignments!

3 Preparation *prior to* class:

- You have read and followed the advice set forth in the *Tips for Analyzing Cases (and Preparing for Class)* memo. The memo is posted on Blackboard in the Course Info folder. For those of you who are interested in additional guidance in preparing for case discussions beyond this memo, I have arranged for access to a “Case Analysis Coach” online tutorial on case analysis offered by Harvard Business School for which you will have to pay a small fee (\$3.95) to register and access at <https://cb.hbsp.harvard.edu/cbmp/access/18730086>. The length is approximately 90–minutes. You are welcome to take advantage of this guide on your own but it is not required.
 - You have completed all required reading and assignments for the day.
 - You are prepared to discuss, explore, and engage in relevant and substantive issues.
 - You have refrained from searching the Internet to see “what happened” after the time of a case. Actual outcomes, while interesting and sometimes discussed following case analyses, are irrelevant for purposes of analyzing the various dilemmas and decision points at hand. Embed yourself in the context of the case.
- 4 The course is designed to provide a non–threatening environment for the further development of your verbal communication skills. I encourage everyone to participate, and will “cold call” as necessary. If you are unprepared for a given class and would prefer not be called upon, please alert me prior to the beginning of class.
- 5 During class, you agree not to use a laptop or other electronic device (e.g., tablet or cell phone) to ensure that everyone is engaged in the flow of the analysis. Use of such devices is not only distracting to the instructor but also to your colleagues. Plan ahead and print/take notes in advance of class.
- 6 The Lundquist College of Business Code of Ethics must be followed at all times. You are encouraged to familiarize yourself with the code (<http://lcb.uoregon.edu/welcome/procode.html>).
- 7 Plagiarism is strictly prohibited and punishable with a non–passing grade in this course. Please read the information posted at this site so we do not have any misunderstandings (<http://libweb.uoregon.edu/guides/plagiarism/students/>).

8 If you have a documented disability and anticipate needing accommodations in this course, please make arrangements to meet with me soon. Please bring a notification letter from Disability Services outlining your approved accommodations.

Grading: Grading for this course comprises both individual (60%) and group (40%) components. The individual component includes: (1) class participation (20%), (2) seven case analysis memos (10%), and (3) two quizzes (30%). The group component consists of a Term Project and includes: (1) an interim report (15% of your grade and 5–7 pages in length), (2) a final report (25% of your grade and 12–15 pages in length), and (3) an in-class presentation of your group’s findings that accounts for five of your 25–point final report total). There is no final exam. The *Term Project Guideline*, which will be distributed and discussed in class, provides more detailed information on the group assignments. Key points and deadlines are summarized below.

Class Participation (20 points): Class contribution is one of the best and most reliable ways that students can demonstrate their understanding of the ideas and models presented in class, as well as their ability to apply them to real business situations. This is your course in the fullest sense—what each person takes away from the course is a direct function of the effort that they and the rest of the group put forth in the discussion.

You should expect to be called upon at any time, whether to open the case discussion with a summary of the key issues, to discuss the required readings, or to answer a specific question on a case. After each class, I will take notes on students’ contributions to the class session.

The following criteria will be used to judge in-class performance. Effective class contribution entails providing good answers to the question at hand. Good answers indicate that you are actively listening to others and are providing comments relevant to the ongoing discussion. Relevant comments add to our understanding of the underlying conceptual material, challenge and clarify the ideas expressed by others, integrate material from past classes or other courses, and show evidence of analysis rather than mere opinion or “gut feeling.” Excellent responses demonstrate that the student has thought deeply about the issue and can develop creative and innovative insights through this analytic effort. Effective class contribution does not entail monopolizing “air time,” ignoring the contributions of others, or repeating case facts without analysis.

The strategy simulation exercise in Class 3A will account for a possible five of the twenty class participation points.

Case Analysis Memos (10 points): For classes involving case discussions, there are case study questions listed in the syllabus. To aid in your preparation for the case, you will be required to submit a one to two–page memo (hard copy) summarizing your response to these questions (except for Time Life, Inc.). The format can be in paragraph, outline, or bullet point form; typed or handwritten. The *Tips for Analyzing Cases (and Preparing for Class)* memo and optional Case Analysis Coach online tutorial should give you some guidance on how to conduct an effective case analysis. The purpose of the memo is to help you prepare for class and the ensuing case discussion.

A hard-copy of each assignment must be turned in at the beginning of class on the day that it is due. You may bring a copy to class for your own reference during discussion.

The content of the memo will not be graded but if I see that you created the memo without reading and putting thought into the the assigned material no credit will be given. If you are ill I will accept the assignment by e–mail attachment if it is received before the beginning of class on the day it is due. There will be no credit granted for late assignments.

Case Memo Assignments Due:

- Cola Wars Continued: Coke and Pepsi in 2010
- British Satellite Broadcasting versus Sky Television
- Samsung Electronics
- The Pharmaceutical Industry in the 1990s
- International Management Group (IMG)
- BRL Hardy: Globalizing an Australian Wine Company

Quizzes (30 points): There will be two quizzes, worth 15 points each. The first quiz, on April 24, will cover Business Level Strategy and the second quiz, on May 15, will cover Corporate Level Strategy.

Term Project (40 points): For the term project, your group will be required to analyze an industry of your choice, identify the top and worst performer within that industry, and make recommendations for improvement to the bottom performer. This project serves three main educational objectives: (1) it provides you an opportunity to practice your skills in strategic analysis and apply concepts covered in the course as well as in your prior coursework, (2) it helps you learn how to conduct research on

industries and firms, and (3) it helps refine your abilities to work in teams, tapping on your understanding of different functional areas.

Each group should have four or five members unless prior permission has been granted. No group may analyze an industry already chosen by another group in the class. If there is a conflict, the earliest submission on Blackboard will have priority. The second group will be required to choose another industry. Industries used in assigned cases should be avoided.

By 11p.m. Saturday April 13th, a representative from each group should submit the names and e-mail addresses of team members. The name of the industry that the group would like to analyze is due by 11p.m. Saturday April 20th. Please submit this information and all other course assignments on Blackboard in the Assignments folder unless asked otherwise. An interim report of your group project is due by 11 p.m. Friday May 3rd. A written copy of the final report is due by 11 p.m. Friday May 24th and should not exceed 15 pages in length (excluding exhibits). Late submissions automatically will be graded down 50%.

Field Trip: To reinforce the lessons from the BRL Hardy wine industry case, we will take a field trip to King Estates winery one afternoon following our discussion of the case on May 13. We will receive a personal behind-the-scenes tour of the production facility and meet with King Estates staff to learn about the winery's business model and the Oregon wine industry more generally. You will also have an opportunity to sample some of King Estate's products. Everyone is encouraged to attend, but this trip is optional and attendance will not affect your grade. More information on this tour will be provided in class.

Attendance and Punctuality: You cannot contribute to our learning if you are not in class. At the same time, I understand that you may be involved in recruiting and other non-academic activities. To balance these considerations, you may miss two class session during the term, no questions asked and without penalty. On these occasions, you are still responsible for turning any assignment *before* the class session that you will miss. Additional absences will lower your class participation points, with more points deducted if you have not alerted me of your absence in advance of class. In the event of illness, please bring a note from the Health Center to the next class session.

For absences related to official LCB Center-related travels, you can receive full credit when written assignments are due by posting them on Blackboard/Assignments prior to the missed class session. Five or more unexcused absences will result in an automatic non-passing D or F grade in this course.

Class will start promptly at 8:00. Out of respect for your fellow classmates, please arrive on time and be ready to begin. You are expected to stay for the entire session.

If lateness becomes an issue, I reserve the right to treat a class for which you are late as a missed class.

Key Dates:

Sat. Apr. 13, 11p.m. Names and Photos of Team Members Due
Mon. April 15, Class 3A Strategy Simulation Exercise
Sat. Apr. 20, 11p.m. Industry Choice Due
Mon. Apr. 24 Quiz #1, Business Level Strategy
Fri. May 3, 11p.m. Interim Report Due
Wed. May 15 Quiz #2, Corporate Level Strategy
M/W, May 20/22 Group Presentations
Fri. May 24, 11p.m. Final Report Due

Evaluation Summary:

Individual Components:

Class Participation 20 points
Case Analysis Memos 10 points
Quiz #1, Business Level Strategy 15 points
Quiz #2, Corporate Level Strategy 15 points

Group Components:

Group Interim Report 15 points
Group Final Report^a 25 points

Total 100 points

^aA peer evaluation of your effort and contributions by group members may influence your individual grade on the team report. Adjustment may be in either a positive or negative direction.

ABOUT YOUR INSTRUCTOR

Arvids A. Ziedonis is an Assistant Professor of Management at the Lundquist College of Business. He spent last fall as a Visiting Professor at the Stanford Institute of Economic Policy Research at Stanford University. Prior to coming to Oregon, Professor Ziedonis was on the faculty at the Stephen M. Ross School of Business at the University of Michigan and also taught at the Wharton School at the University of Pennsylvania. He received his Ph.D. from the Haas School of Business at the University of California, Berkeley, as well as an MBA and MS in engineering from Berkeley, and a BS in engineering from Purdue University. Prior to his doctoral studies, his career includes positions as a business development executive at a San Francisco Bay Area specialty environmental engineering firm, a corporate planning analyst at Pacific Gas and Electric Company, and an engineer at Bechtel Corporation.

Professor Ziedonis' research focuses on strategies by start-ups and established firms in commercializing scientific inventions and embryonic technologies. His work has been published in academic journals such as *Management Science*, *Advances in Strategic Management*, *Journal of Technology Transfer*, and *Research Policy*. His co-edited volume entitled Technology Strategy and Innovation Management was recently published by Edward Elgar Publishing. Professor Ziedonis has also co-authored a book on the commercialization of university science, Ivory Tower and Industrial Innovation, published by Stanford University Press. His doctoral thesis was awarded the 2003 prize for Best Dissertation in Technology Management by the Institute for Operations Research and the Management Sciences. Professor Ziedonis is an associate editor at *Management Science* and currently serves on the editorial boards for the *Strategic Management Journal* and *Research Policy*. At Michigan, he helped establish a graduate program in science and technology policy. Professor Ziedonis is currently the Division Chair of the Technology and Innovation Management Division of the Academy of Management.

MGMT 614: Strategic Management

Detailed Class Schedule

I. What Strategy Is and Is Not

Class 1A:

Monday, April 1

Reading:

GRANT: Chapter 1, The Concept of Strategy and Chapter 2, Goals Values, and Performance

Case: CASE: Time Life, Inc. (A), *HBS Case #9-395-012*

Questions:

- [1] What challenges did John Fahey face in 1992? What is your evaluation of the steps he took? What has been accomplished and what remained to be done as of January 1993?
- [2] What challenges did Candice Carpenter face as president of the video and television division? How should she proceed?
- [3] What challenges did John Hall face as president of the books division? What is your evaluate of his proposed action plan?
- [4] What would you do about *True Crime*?

II. External Environment

Class 1B:

Wednesday, April 3

Reading: GRANT: Chapter 3, Industry Analysis

Class 2A:

Monday, April 8

Case: Cola Wars Continued: Coke and Pepsi in 2010, *HBS Case #9-711-462*

Questions:

- [1] Why is the soft drink industry so profitable?
- [2] Compare the economics of the concentrate business to the bottling business. Why is the profitability so different?
- [3] How has the competition between Coke and Pepsi affected the industry's profits?
- [4] Can Coke and Pepsi sustain their profits in the wake of flattening demand and the growing popularity of non-carbonated drinks?

Class 2B:

Wednesday, April 10

Reading:

GRANT: Chapter 4, Further Topics in Industry and Competitive Analysis, pp. 92–99

Smith, William D. (1967). “Companies Tighten Up on Loose Talk,” *The New York Times*, 02/06/1967

“Taking Business in Flight? Be Careful,” *The New York Times*, 05/03/2012

Penenberg, A.L., and M. Barry (2000). “The Pizza Plot,” *The New York Times Magazine*, 12/03/2000

Pindyck, R.S., and D.L. Rubinfeld (2001). Microeconomics, 5th ed., Chapter 13, Game Theory and Competitive Strategy (pp. 479–487 and Section 13.7, 503–509) *Optional*

Case:

British Satellite Broadcasting versus Sky Television, *HBS Case #9-794-031*

Questions:

- [1] How might BSB have been able to identify News Corporation as a potential competitor prior to Rupert Murdoch's announcement of the launch of Sky Television?
- [2] What might BSB have done differently before Sky's entry announcement? Following the announcement?

- [3] What should BSB do in 1990? In particular, what share of a possible merger pie would you hold out for, as BSB?

Class 3A:

Monday, April 15

Reading: GRANT: Chapter 4, Further Topics in Industry and Competitive Analysis, *Complements: A Missing Force in the Porter Model?* pp. 89–91

Brandenburger, Adam M., and Barry J. Nalebuff (1997). *Co-opetition*, pp. 11–16.

Player User Guide, Strategy Simulation: Competitive Dynamics and Wintel, Harvard Business School Publishing

Strategy Simulation: Competitive Dynamics and Wintel, *purchase access from HBSP*

Class Will Meet in the North Lab of the Business Technology Center

III. Sources of Competitive Advantage

Class 3B:

Wednesday, April 17

Reading:

Rothaermel, F. (2013). *Strategic Management: Concepts and Cases*, Chapter 4: Internal Analysis: Resources, Capabilities, and Activities (pp. 60–75)

GRANT: Chapter 7, The Sources and Dimensions of Competitive Advantage

Class 4A:

Monday, April 22

Case: Samsung Electronics, *HBS Case #9-705-508*

Questions:

- [1] What recommendation would you make to Chairman Lee regarding Samsung's response to the threat of large scale Chinese entry?

[2] What were the sources of Samsung's cost advantage in DRAMs in 2003?

[3] What were the sources of Samsung's price premium in DRAMs in 2003?

IV. Business Level Strategy Synthesis

Class 4B:

Wednesday, April 24

Quiz #1

V. Vertical Integration

Class 5A:

Monday, April 29

Reading: GRANT: Chapter 11, Vertical Integration and the Scope of the Firm

Class 5B:

Wednesday, May 1

Case: The Pharmaceutical Industry in the 1990s, *HBS Case #9-796-058*

Questions:

[1] Before the PBM acquisitions, how did PBMs affect the performance of leading pharmaceutical firms? Why wasn't the relationship between the pharmaceutical firms and PBMs stable?

[2] Why did Merck, SmithKline, and Lilly purchase PBMs rather than buy information in arms-length transactions?

[3] What should Raymond Gilmartin do to position Merck now that the acquisitions have occurred?

VI. Horizontal Diversification

Class 6A:

Wednesday, May 8

Reading: GRANT: Chapter 13, Diversification Strategy

Albergotti, R., “How Tiger’s Top Man is Managing the Crisis,” *The Wall Street Journal*, 12/8/2009

Case: International Management Group (IMG), *HBS Case #9-702-409*

Questions:

- [1] Where does the value in the relationship between clients and IMG reside (with agents? with IMG? Elsewhere?)
- [2] Evaluate IMG’s decisions to enter new areas or lines of business. Which areas of expansion do you consider most sensible, and which are least compelling?
- [3] What do you perceive to be the biggest challenges in structuring an organization like IMG? How might these difficulties be overcome?

Class 6B:

Wednesday, May 8

Group Meetings

VII. Global Strategy

Class 7A:

Monday, May 13

Reading: GRANT: Chapter 12, Global Strategy and the Multinational Corporation

The New York Times, “For Australian Winemakers, More Turns Out to be Less,” 7/4/2009

Case:

BRL Hardy: Globalizing an Australian Wine Company, *HBS Case #9-300-018*

Questions:

- [1] How do you account for BRL Hardy’s post-merger success?
- [2] What is the source of tension between Stephen Davies and Christopher Carson? How effectively has Steve Millar handled their differences?

[3] If you were Millar, would you approve Carson's proposal to launch *D'istinto*? Why or why not?

[4] What recommendation would you make concerning the conflicting proposals for *Kelly's Revenge* and Banrock Station?

VIII. Corporate Level Strategy Synthesis

Class 7B: Wednesday, May 15

Quiz #2

IX. Bringing it All Together

Class 8A: Wednesday, May 20

Group Presentations

Class 8B: Monday, May 22

Group Presentations and Course Wrap-Up

Class 9A: Monday, May 27

Memorial Day Holiday—No Class

* * *

Summary Outline: I–IV, Business Level Strategy

Session	Date	Readings and Cases	
I. What Strategy Is and Is Not			
1A	4/1	GRANT:	Chapter 1, The Concept of Strategy
		CASE:	Time Life, Inc.
II. External Environment			
1B	4/3	GRANT:	Chapter 3, Industry Analysis
2A	4/8	CASE:	Cola Wars Continue: Coke vs. Pepsi in 2010
2B	4/10	GRANT:	Chapter 4, Further Topics in Industry and Competitive Analysis
		ARTICLE:	“Companies Tighten Up on Loose Talk”
		ARTICLE:	“Taking Business in Flight? Be Careful”
		ARTICLE:	“The Pizza Plot”
		ARTICLE:	<u>Game Theory and Competitive Strategy</u> , <i>Optional</i>
		CASE:	British Satellite Broadcasting vs. Sky Television
3A	4/15	GRANT:	Chapter 4, Further Topics in Industry and Competitive Analysis
		ARTICLE:	<u>Co-opetition</u>
		ARTICLE:	“Player User Guide, Competitive Dynamics and Wintel”
		SIMULATION:	Competitive Dynamics and Wintel
III. Sources of Competitive Advantage			
3B	4/17	GRANT:	Chapter 7, The Sources and Dimensions of Competitive Advantage
		ARTICLE:	<u>Internal Analysis: Resources, Capabilities, and Activities</u>
4A	4/22	CASE:	Samsung Electronics
IV. Business Level Strategy Synthesis			
4B	4/24	QUIZ 1	

Summary Outline: V–IX, Corporate Level Strategy

Session	Date	Readings and Cases	
V. Vertical Integration			
5A	4/29	GRANT:	Chapter 11, Vertical Integration and Scope of the Firm
5B	5/1	CASE:	The Pharmaceutical Industry in the 1990s
VI. Horizontal Diversification			
6A	5/6	GRANT:	Chapter 13, Diversification Strategy
		ARTICLE:	“How Tiger’s Top Man is Managing the Crisis”
		CASE:	International Management Group (IMG)
6B	5/8	Group Meetings	
VII. Global Strategy			
7A	5/13	GRANT:	Chapter 12, Global Strategy and the Multinational Corporation
		ARTICLE:	“For Australian Winemakers, More Turns Out to be Less”
		CASE:	BRL Hardy: Globalizing an Australian Wine Company
VIII. Corporate Level Strategy Synthesis			
7B	5/15	QUIZ 2	
IX. Bringing it All Together			
8A	5/20	Group Presentations	
8B	5/22	Group Presentations and Course Wrap-Up	
9A	5/27	MEMORIAL DAY HOLIDAY–NO CLASS	

MGMT 620: Managing Global Business
Syllabus: September, 2012 (Revised Sept. 24, 2012)

University of Oregon
Lundquist College of Business
Fall 2012 – Monday and Wednesday 10:00 AM–11:20 AM
Lillis 262

Instructor: Tom Durant
Office: Anstett Hall 398A
Office Hours: 11:30 AM – 1:30 PM Monday and Wednesday + by appointment
E-mail: durant@uoregon.edu or uscduck@hotmail.com
Home Office Hours and Telephone: Monday-Saturday, 9 AM-4PM, 541-683-1778

Course Overview

Welcome to Management 620!

This course is designed as a broad survey of global business management. Our focus will concentrate on the concepts of national political economies, global trade/expansion, culture/values, ethics, international strategy, and international social/sustainable enterprises. Students taking this class will emerge with an in-depth background that will allow them to:

- Manage effectively when faced with differences in national political/legal/economic systems, cultures, and ethical perspectives
- Understand and analyze the economics and politics of trade
- Strategize in an international context
- Make informed decisions regarding international expansion

This course is built around a series of lectures, in-class discussions, independent research, and case analysis. Preparation and energetic participation are important elements of the class.

Course Goals

- Understand the nature of the global economy and differences in country socio-political, economic, and cultural systems
- Understand the globalization of markets and production
- Understand the emergence of global institutions, global trade and investment
- Learn how to manage in different cultural environments
- Develop and apply strategies to compete in the global marketplace

Communication

- Class announcements will be sent via Blackboard - make sure your preferred email account can receive these messages
- I will respond to email within one business day – if you have an emergency please call me at my home office 541-683-1778
- Blackboard will be the repository for all class materials

MGMT 620: Managing Global Business
Syllabus: September, 2012 (Revised Sept. 24, 2012)

Course Materials

The primary text for the course is *Global Business Today*, 7th Edition, by Charles W. L. Hill (chapters 1-6, 11-12), ISBN 978-0-07-813721-1. In addition, **a course packet has been created** that incorporates material from **outside articles/case studies** (*Harvard Business Publishing*) and several chapters from *Management Across Cultures*, 2nd edition draft, by Richard M. Steers et al (chapters 3, 4, 6, 9). A copy of the primary text and course packet will be on reserve in the library and available for purchase in the book store. All other materials will be posted on Blackboard, or provided in hardcopy.

Note: Since we will not cover the entirety of *Global Business Today*, and to help you minimize material costs, you can use the **eTextbook** version of the book, or a used copy. Look online to minimize your out-of-pocket expense, and make certain it is the correct version of the text.

Course Requirements (100%)

Attendance and Participation (Used only for final grades if you are “on the bubble”) – Showing up, contributing, and putting effort into class discussion

- Attendance is mandatory unless you are sick or have an emergency, in which case you need to contact me by email or phone prior to class in order to be excused from class.
- Participation is defined as asking a relevant question, responding to a question, offering a comment, or expressing opinion during class discussion.
- Your final grade will only be impacted, positively or negatively, if your final grade for the course is “on the bubble,” (between final grades for the course), in which case the instructor will make a judgment call regarding your attendance/participation.
- I will try my best to get each student to participate willingly; however, if I sense that a student is not participating, I will call upon that student to encourage participation.

Individual Case Analyses (40%)—Case analyses (submit two of four for grading—20% each)

- Students are required to **analyze all four** assigned case studies; however, you are only **required to submit two** for grading (20% pts. each).
- Each case study will be thoroughly vetted on the date assigned. You will be called upon during class to respond to questions posed by the instructor.
- You are required to submit two cases analyses of your choice with **each submitted as an electronic copy (MS Word doc., or docx. only) sent via email as an attachment** to the instructor prior to the class session on the due date of the assignment. **Please put your last name, the course number, and the case name as part of the file name and subject line in the email.** For example, (Smith_ MGMT620_Starbucks). Late write-ups will not be accepted.
- Each paper needs to be a typewritten and double-spaced document, and cannot exceed 1,500 words, excluding bibliography and footnotes, or in-text citations.
- If outside research is performed, you will need to identify the source of your material using a proper bibliography with footnotes or in-text citations.
- General guidelines for case analyses, a list of specific questions for each case analysis, a grading rubric, and a case analysis example are posted in Blackboard.

MGMT 620: Managing Global Business
Syllabus: September, 2012 (Revised Sept. 24, 2012)

Individual mini-papers (10%)—Individual papers (submit all four papers—2.5%/ each)

- Four individual hard copy versions of your mini-papers of no more than one page each (single spaced and typewritten) are required during the course as reflected on the course schedule.
- You will hand in the **hard copy of the paper at the end of the class session on the assigned due date.**
- The mini-paper assignments are annotated on the course schedule (below) as research based on the Research Task (RT) identified at the end of a GBT chapter; performance of some independent research online (IR); or, as answers to specific questions posed at the end of a GBT chapter identified as Critical Thinking and Discussion Questions (TDQ). For each RT, IR, or TDQ, prepare your responses in typewritten, hard copy form, and limit your response to one page (single spaced). The mini-paper questions and general guidelines are posted in Blackboard.
- Grading will be determined by two factors; including, the thoroughness of your response to the assigned questions (80%), and the readability of the document (20%).

Group Assignment (25%)—Group paper (15%), group presentation (10%)

- The instructor will create student groups who will study market entry of a product or service from an existing corporation of the group's choosing into a new country.
- The project will be based on original research.
- The group will submit a 15 page (maximum), double-spaced paper excluding exhibits.
- A proper bibliography and footnotes should be provided in your paper.
- The group will make a 15 minute presentation to the class during the last week of class
- Group project guidelines and a grading rubric are posted in Blackboard.

Final exam (25%)—Comprehensive exam

- The exam covers all text material from the two texts, assigned articles, and class discussions. The final exam excludes case study/analysis material, and mini-paper assignments.
- The final exam will feature a combination of multiple choice, true/false, and short answers.

Grades

Grades will be based on the following scale, although I retain the right to amend this scale for the student's benefit:

Letter Grade	Raw Score %	Letter Grade	Raw Score %
A+	>97	C+	79-78
A	96-92	C	77-72
A-	91-90	C-	71-70
B+	89-88	F	69 or less
B	87-82		
B-	81-80		

CODE OF CONDUCT

The Lundquist College of Business learning community is committed to a set of core values that guide our interactions with one another. Our values are as important within our LCB community as within the business community. Our values help define both how we aspire to act and what it means to be a business professional.

INTEGRITY

MGMT 620: Managing Global Business
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Members of our community act with integrity and honesty. These qualities are essential in providing a basis for trust and go to the core of what is expected from business professionals.

RESPECT

Our community conveys respect for the dignity of all people. Our relationships are based on mutual respect. Differences of opinion are discussed openly and civilly. These discussions focus on issues and are presented in a courteous manner. We are sensitive to the impacts of both our words and actions on others.

OPENNESS

We encourage all members of our community to exchange ideas freely within the bounds of reasonable behavior. We recognize that learning requires an open environment.

RESPONSIBILITY

We act publicly and accept responsibility for our actions. We understand that the community will keep us accountable for our dealings. We deliver on the commitments and promises we make to others.

TEAMWORK

Our community is stronger when we work as a team. We foster attitudes encouraging members of the community to give and receive constructive criticism, and develop creative solutions to challenges.

Managing Global Business—Fall 2012 Course Schedule (Subject to Modification)

Global Business Today (GBT) chapters, *Management Across Cultures* (MAC) chapters, assigned case studies and assigned articles need to be read before the class due date.

Class	Date	Topic	Before Class	In Class	Due (Assignments and outside reading)
1	9/24	Introduction	GBT Ch. 1	Lecture	
2	9/26	Introduction Globalization	GBT Ch. 1 (cont'd)	Lecture, discussion	Personal Profile due Skills Assessment due
3	10/1	Nat'l. political-economic differences	GBT Ch. 2, Steve Ellis (read article)	Lecture, guest lecture, discussion, Exercise	http://www.waterstechnology.com/waters/feature/2182020/-suited-steve-ellis-merges-fargo-wachovia
4	10/3	Int'l. trade theory	GBT Ch. 5 TDQ # 6 a-e (pg. 86, Chapter 2)	Lecture, discussion, Group formation	TDQ Paper due: Question #6 a through e (Ch. 2, pg. 86 in GBT) "Chavez's Venezuela"
5	10/8	Global Expansion	Read: "Distance Still Matters: The Hard Reality of Global Expansion"	Case Study Discussion	Case Analysis #1 due: "The Globalization of Cemex" http://highered.mcgraw-hill.com/sites/dl/free/007813711x/816514/Sample_Chapter.pdf Read pages 95-105 only.

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6	10/10	Political economy & Int'l. trade	GBT Ch. 6	Lecture, discussion	Group idea for term project and group bonding activity report due
7	10/15	Differences in Culture; Understanding Cultures and Institutions	GBT Ch. 3, MAC Ch. 3	Lecture, discussion	IR Paper due: "Why was Wal-Mart a success in Mexico, but a failure in Germany?"
8	10/17	Culture: Ethics Culture: Managerial Mind	GBT Ch. 4 MAC Ch. 4	Lecture, discussion	
9	10/22	Culture: Ethics Culture: Managerial Mind (cont'd)	GBT Ch. 4 RT #2 (pg. 158) MAC Ch. 4	Lecture, discussion	RT Paper due (pg. 158 in GBT): "What is the Corruption Perception Index? Who are the top 5 and bottom 5 countries? What commonalities exist for the top 5 and for the bottom 5?"
10	10/24	Culture: Understanding Global Organizations	MAC Ch. 6	Lecture, discussion	
11	10/29	Culture, work and motivation	MAC Ch. 9	Lecture, discussion	
12	10/31	Culture, work, motivation (cont'd)	Read: "One more time: How do you motivate employees?"	Case Study Discussion	Case Analysis #2 due: "Lincoln Electric: Venturing Abroad"
13	11/5	Strategy of International Business	GBT Ch. 11 Read: "Expanding Abroad: Motivations, Means, and Mentalities" (pgs. 1-14)	Lecture, discussion	http://highered.mcgraw-hill.com/sites/dl/free/007813711x/816514/Sample Chapter.pdf Read pgs. 1-14 only
14	11/7	Entering Foreign Markets	GBT Ch 12	Lecture, discussion	

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15	11/12	Entering Foreign Markets		Case Study Discussion	Case Analysis #3 due: “Chabros International”
16	11/14	Guest Lecture	Research Datalogic Scanning online http://www.scanning.datalogic.com/	Lecture, discussion	IR Paper due: “What are the products, markets, and locations of business operations for Datalogic Scanning? What type of global strategy best describes Datalogic Scanning—justify your answer?”
17	11/19	Social Enterprise, Sustainability	Review EcoCafé Haiti website	Lecture, discussion	Review EcoCafé Haiti website, www.ecocafehaiti.com
18	11/21	Social Enterprise, Sustainability		Case Study Discussion	Case Analysis #4 due: “Starbucks and Conservation Int’l.”
19	11/26			Group Presentations	Group Paper due, Group presentation due
20	11/28			Group Presentations (cont’d), Final exam review (time permitting)	
21	12/7	Final Exam	10:15 AM	Final Exam	Final Exam

Instructor: Andy Jenness
 Office: TBA
 Office Hours: TBA and by appointment
 Email: ajenness@uoregon.edu; andy@jennessco.com
 Phone / Text: 541-517-1255
 Resources: Winning at new Products 4th Edition (Robert G. Cooper)

Course Description

This course covers the process and best practices for new product development using the “stage-gate” system. Through concept idea to product launch we will explore the decisions necessary through each stage of development. The concepts and ideas learned in this course are applicable to both new venture product development as well as new product development within the structure of an existing business.

This course will also emphasize the interactive nature of marketing between product/service providers and customers or end users. Likewise, priority will be given to communication skills including written, interpersonal, and group presentations.

Student Engagement:

In class	30
Assigned readings	30
Projects	35
Writing assignments	<u>25</u>
Total Hours	120

Grading

The level of comprehension that you achieve will be assessed by grades given for **midterm exams** (two), **group project** (one), **class participation** and a **final exam**. Complete information for the graded work in this course is listed below:

Midterm exams	(individual work, 2 @ 225 pts)	450
Project	(group work, 200 pts)	200
Class participation	(100 pts)	100
Final exam	(individual work, 250 pts)	<u>250</u>
Total Points Possible		1000

Letter grades for the quarter will be assigned in the following manner:

A's: 1,000 to 933 = A 932 - 900 = **AB's:**

899 to 867 points = B+ 866 to 833 = B 832 - 800 = **BC's:**

799 to 767 points = C+ 766 to 733 = C 732 - 700 = **CD's:**

699 to 667 points = D+ 666 to 633 = D 632 - 600 = **DF's:**

Below 600 points

If appropriate, grades for the course may be curved (i.e., a student earning 890 points may be given a grade of A- instead of a grade of B+ at the end of the term). If you have questions on the grade you receive in this course, you must address this before the end of the first week of the following term.

Midterms: Students will be given an in-class exam lasting one hour. Midterms may consist of both essay and multiple-choice questions.

Project: The *Product Concept and Assessment* project will consist of three parts. Part 1 will include idea generation. Part 2 will be a persuasive paper, making the case to invest in the project. Part 3 will be a group presentation in class of the new product. The projects will be conducted by a group of 4-5 students.

Class participation: This will include attendance, participation during in-class discussions, peer evaluations and other assignments.

Peer evaluations: You will have an opportunity to evaluate the work and effort of your teammates. For this assignment you are asked to, on paper, assign up to \$100 in salary to each of your team members. For example, if you have 5 team members, including yourself, you will distribute a total of \$500 to the group. If you believe each member contributed exactly 20% to the success of the team then each member will receive \$100. If you believe others contributed more you will want to assign them more money and less to those who, in your opinion, were less productive. You will also provide a short paragraph for each member explaining your reasons for the distribution.

Attendance: You are expected to be in class on time, every time the class meets. Two or more unexcused absences will result in a lowered grade of one letter grade (e.g., A to A-). If a class will be missed due to an unforeseen event such as illness, notify instructor as soon as possible, preferably prior to class.

Final Exam: Students will be given a comprehensive final exam during the regularly scheduled final exam time. The final will consist of both essay and multiple choice questions.

Extra Credit: The instructor may offer extra credit. Any extra credit offer must be extended to the entire class (i.e., if one student has an opportunity to earn extra credit, all other students must be given the same opportunity).

COURSE POLICIES

Code of Conduct: Students who take this course are expected to adhere to the University of Oregon code of student conduct. If you are not familiar with this, it can be obtained from the following website:

<http://uodos.uoregon.edu/StudentConductandCommunityStandards/StudentConductCode.aspx>. I am thankful for and appreciate the vast majority of students who abide by the code of student conduct. However, a note of warning to the few

students who may choose not to abide by the code - *I find violations of the code unacceptable, and I will respond to any and all violations with the most severe sanctions allowed by the code.* I will give the offending student a failing grade for the course and subject him/her to any and all further disciplinary action possible. I do this in order to protect the vast majority of students who abide by the code.

Students with Disabilities: As per University of Oregon policy, "*The University of Oregon is dedicated to the principles of equal opportunity in education and an acceptance of diversity as an affirmation of individual identity within a welcoming community. Disability is recognized as an aspect of diversity integral to the university and to society.*" Students who are eligible for accommodations should contact disability services at 541.346.1155, by e-mail at uoaec@uoregon.edu, or on the web: <http://aec.uoregon.edu/>. Disability services are located at 164 Oregon Hall.

Computer Use: You are encouraged to bring your computer to class to participate in team projects, research and share ideas via Twitter. Please do not abuse this policy by shopping, Facebooking, checking baseball scores, etc. Provided you stay on track, your laptop is a welcome addition to the classroom.

Class Schedule

	Date	Subject & Required Reading	To Do
Week 1	5-Jan	Introduction, syllabus, Innovation challenge Chapter 1	<ul style="list-style-type: none"> Form Teams for group project
	7-Jan	Why new products win Chapter 2 & 3	
Week 2	12-Jan	The "Stage - Gate" system Chapter 4 & 5	<ul style="list-style-type: none"> Team roster & goals due
	14-Jan	Discovery, idea generation Chapter 6	
Week 3	19-Jan	No Class in observance of Martin Luther King Jr. Day	<ul style="list-style-type: none"> Idea Generation paper due
	17-Jan	Mid term review/ group work	

Week 4	26-Jan	Mid Term Chapters 1-6	•
	28-Jan	Stages 1-3 Chapters 7	
Week 5	2-Feb	Picking the right projects Chapter 8	•
	4-Feb	Gates that work Chapter 9	
Week 6	9-Feb	Group presentations: progress, gate criteria	• Project update due
	11-Feb	Development, testing, & launch: Chapter 10	
Week 7	16-Feb	Implementing Stage-Gate Chapter 11	•
	18-Feb	Midterm review	
Week 8	23-Feb	Mid term 2	•
	25-Feb	Presentation workshop	
Week 9	2-Mar	Continued Market Research The voice of the consumer	•
	4-Mar	Overall Stage-Gate review	
Week 10	9-Mar	Group presentations	•
	11-Mar	Group presentations	

MARKETING RESEARCH MKTG660, SPRING 2012

Instructor:	Professor Jun Ye Office: 486 Lillis 1208 University of Oregon, Eugene OR 97403 Phone: 541-346-2839 Email: junye@uoregon.edu
Office Hours:	Tuesday, 1:30-3:30pm and by appointment
Required Text:	McDaniel and Gates (MG), Marketing Research (8 th Ed., 2009), Wiley (ISBN 9780470087022). Harvard Business course pack: http://cb.hbsp.harvard.edu/cb/access/13472373
Required Software:	SPSS is available in computer labs. SPSS Student Version for Windows and a license for 24 months is packaged with the required textbook.
Recommended Text:	Norusis, SPSS 17.0 Guide to Data Analysis (1 st Ed., 2010), Prentice Hall (ISBN 9780321621436). The required and recommended texts are on reserve in the Knight Library.

OVERVIEW AND OBJECTIVES

Course Objectives

This course provides you with the skills and tools needed to conduct and evaluate marketing research. To this end the course is organized into two major parts: 1) understanding the managerial problem and designing the research accordingly, and 2) analyzing the data and making recommendations.

This is a hands-on course likely to be of use to anyone pursuing a career in entrepreneurial ventures, management/marketing consulting, advertising agencies, venture capital, as well as more traditional marketing and management roles.

Course Material and Approach

The most important readings are contained in the required textbook. The SPSS guide book is not required, but I highly recommend this book to people who want to pursue a career in management consulting and marketing research, and who want to improve their analytical skills with the most popular statistical software in industry. One additional reading is included in the Harvard Business course pack. You may order the reading directly from the link provided above. The course emphasizes applications and there will be guest lecturers who will share perspectives into the practice of marketing research. Lecture slides will be made available on the Blackboard

throughout the term.

ASSESSMENT

Components	Total
Individual	
Class Participation	20 points
Individual assignments	50 points
Mid-term examination	50 points
Final examination	50 points
Peer evaluation	10 points
Team	
Term Project Questionnaire	20 points
Term Project Mid-term Report	20 points
Term Project Final Report	50 points
Term Project Presentation	10 points
Total	280 points

Letter grades will be assigned from a “straight scale” (see below). The scale may be altered in your favor if class performance (not your performance) warrants a more lenient method. If your performance falls exactly on the borderline (e.g., 92%), you will receive the higher grade.

A+ (98 – 100%)	A (92 – 98%)	A- (90 – 92%)
B+ (88 – 90%)	B (82 – 88%)	B- (80 – 82%)
C+ (78 – 80%)	C (72 – 78%)	C- (70 – 72%)
.....		

Class Participation/Preparation

Every session of the course will involve interaction in the form of class discussion. I expect each class member to be prepared at all times to comment in any class session. To reinforce this expectation, I reserve the right to “cold call” throughout the ensuing discussion (whether or not the class member’s hand is raised).

Grading class participation is necessarily subjective. The criteria for evaluating effective class participation include (a) if the participant attends to all classes on time; (b) if the participant is well prepared on all topics; (c) if the participant actively contribute to class discussions including initiating discussion, responding to questions. Keep in mind that your grade for class participation is not simply a function of the amount of “air time” you take up.

Individual Assignments

The purpose of these exercises is to give you “hands-on” experience with designing research and data analyses. These assignments will help clarify the concepts and techniques discussed in the classroom. The due dates are given in the class schedule. The detailed description of the assignments is posted on Blackboard.

Examinations

There will be two examinations. The midterm exam is a closed-book and closed note exam. The midterm will employ a combination of essays and objective questions (multiple choice and true/false).

The final exam is a two-day take-home exam. All the materials we have learned in this class will be covered in the final exam. It involves essay questions and data analytical questions.

Any conflicts with the exam date need to be discussed with the instructor before the scheduled date to possibly avoid a zero for the exam.

Term Project

The term project will give you an opportunity to design and conduct a full-fledged marketing research project in an area of your own choosing. Since the research project will involve a considerable amount of time and effort, it is vitally important that you work on a project that you find interesting. The term project is team-based. Teams will conduct **BOTH** secondary **AND** primary research on a topic. Each team should have 4-5 members. Diversity is encouraged.

Description

You have substantial discretion in choosing a problem. You can select any product/service as long as it is not too difficult to collect primary data about it.

Some examples of studies that can be chosen include but are not limited to:

- ✧ Customer perception and preference studies—establishing customer perceptions and preferences about the focal product and competing products, identifying importance of product attributes, identifying potential segments and how they differ in terms of product and attribute.
- ✧ Market potential studies—estimating the market demand for a new product/service by analyzing secondary data and estimating intentions to purchase from primary data
- ✧ Segmentation studies—developing customer profiles of product usage based on demographics, psychographics, shopping behavior, preferences for product attributes, media habits, etc
- ✧ Product/Brand Image studies—identification and comparison of competing products/brands based on key criteria (related to the research problem); analysis of segment differentiation along image dimension.

Mid-Term Project Report

One mid-term report will be due from each team. The main purpose of the report is to keep you on track. Late reports will be heavily penalized.

The following should be included in the mid-term report.

- ✧ Defining the research problems: Formulate and state formally the management decision problem and marketing research problem. Develop and state a set of specific research objectives and describe in detail the information needs for your project.
- ✧ Reporting the findings of exploratory research: Conduct exploratory research to refine your research objectives and approach. The objective is to obtain insights into the research problem, help you focus on the key issues and design an appropriate primary research.

- Use secondary data (e.g., online research databases; trade journals to get background information on the nature of the industry; magazines, newspapers, and other web resources) to develop new insights about your project topic. Prepare a summary of your findings and conclusions with a list of information sources attached.
- Conduct qualitative research relating to your project (e.g., focus group) and report insights gained (use quotes to support arguments). Also, turn in your focus group discussion guide that outlines the structure of the study, the procedures followed in conducting the study, list of questions asked, etc.

Term Project Final Report and Presentation

The final project report will be a full description of your project. The following should be included in your final report:

- ✧ Title Page
- ✧ Table of Contents
- ✧ Executive Summary
- ✧ Managerial Problem and Research Question Formulation
- ✧ Research Design
 - ◆ Describing the exploratory research including secondary data and qualitative research that has been conducted.
 - ◆ Describing the conclusive research your team has conducted. Briefly discuss (a) what initiatives you have taken to ensure measurement reliability and validity, (b) what you have considered in designing the questionnaire, and (c) sampling procedure, sampling frame, and your assessment of the sample representativeness.
- ✧ Data Analyses and Findings
- ✧ Results Interpretation, Conclusions and Recommendations.
- ✧ Appendixes (e.g., focus group discussion guide, a URL link of the questionnaire)

There will also be a final oral presentation to the class (20 minutes per team+ 5 minutes questions). Use PowerPoint. Dress professionally. Your presentation will be evaluated by the instructor, the clients, and the peer student teams.

Format of the Reports

- ✧ All written report must use MS Word files with default margins (1” for top and bottom, 1.25” for left and right). The report must be single spaced in 12-point font Times New Roman, with pages numbered consecutively throughout the report.
- ✧ The mid-term project report should be less than 8 pages in length. The final report should not be greater than 15 pages in length, inclusive of all text and exhibits (tables, figures, appendices, and so on).
- ✧ The written report should have a cover page. The following information should appear on the cover page: course number, report name, team name, team member, email of each team member, and submission date.

ACADEMIC INTEGRITY

All students in this course are expected to adhere to university standards of academic integrity. Cheating, plagiarism, and other forms of academic dishonesty will not be tolerated in this course. This includes, but is not limited to, consulting with another person during an exam, turning in written work that was prepared by someone other than you, and making minor modifications to the work of someone else and turning it in as your own.

Ignorance will not be permitted as an excuse. Cheating or plagiarism will result in a grade of “F” for the course.

If you are not sure whether something you plan to submit would be considered either cheating or plagiarism, it is your responsibility to ask for clarification. Either ask the professor about it or consult credible sources of information on the subject.

LEARNING DISABILITY

The University of Oregon is working to create inclusive learning environments. Please notify me if there are aspects of the instruction or design of this course that result in disability-related barriers to your participation. Students with documented disabilities who choose to take exams outside of the regular class time should provide the instructor with written documentation of the disability and with the required forms from Disability Services within the first two weeks of class. You may also wish to contact Disability Services in 164 Oregon Hall at 346-1155 or disabsrv@uoregon.edu.

Class Schedule

-----Week 1-----

M, 04/02 Course Overview and Research Design

Readings:

- ✧ Syllabus, MG Ch. 1, 3

W, 04/04 Exploratory Research: Secondary Data and Databases

Guest Speaker: Kaiping Zhang, Business Librarian

The class will be held in computer lab (Chiles 323)

Readings:

- ✧ MG Ch.4, 7 (pp.198-206)

Project Status:

- ✧ Form team and select project topic

-----Week 2-----

M, 04/09 Exploratory Research: Qualitative Research

Tour the Business Research Institute at LCB

Readings:

- ✧ MG Ch. 5, 7 (pp.206-214)
- ✧ Anderson, *Ethnographic Research: A Key to Strategy*, *Harvard Business Review*, March 2009 (downloadable from the library databases)

Task due:

A one-page description of the project topic including the definition of management decision problem and marketing research problems

W, 04/11 Marketing Research Industry and Career Opportunities

Guest Speaker, Darrin Helsel, Market Strategies International

Readings:

- ✧ MG Ch.2
- ✧ Honomichl Top 50 Marketing Research Firms in the World (available on Blackboard)

Project Status:

- ✧ Conduct secondary research, develop focus group guide

-----Week 3-----

M, 04/16 Descriptive Research: Survey and Observation

Readings:

- ✧ MG Ch.6, 7 (pp.214-233), 8
- ✧ Assael & Keon (1982), Nonsampling vs. Sampling Errors in Survey Research, *Journal of Marketing*, 46(1), 114-123.
- ✧ How to Develop Online Surveys That Work, *InsightExpress*, 2002

W, 04/18 Measurement Fundamentals

Readings:

- ✧ MG Ch.10
- ✧ DuPont case questionnaire (identify the level of scale of each question).

Project Status:

- ✧ Conduct focus group

-----Week 4-----

M, 04/23 Questionnaire Design

Readings:

- ✧ MG Ch.12
- ✧ Design and Develop the Web-Based Survey Instrument (available on Blackboard)

W, 04/25 Scaling Techniques and Qualtrics Introduction

Readings:

- ✧ MG Ch.11
- ✧ Qualtrics Survey Software: Handbook for Research Professionals (available on Blackboard)

Project Status:

- ✧ Refine research questions, draft survey questionnaire

-----Week 5-----

M, 04/30 SPSS Introduction

The class will be held in computer lab (Chiles 323)

Readings:

- ✧ Run the SPSS tutorial before coming to class
- ✧ SPSS Ch. 1-3, 9, Appendix A, B.

W, 05/02 Causal Research: Experimentation

Readings:

- ✧ MG Ch.9
- ✧ Burke, Virtual Shopping: Breakthrough in Marketing Research, *Harvard Business Review*, March-April 1996 (downloadable from the Library databases)

Project Status:

- ✧ Draft survey questionnaire

Task Due:

- ✧ Term project midterm report

-----Week 6-----

M, 05/07

Sampling

Reading:

- ✧ MG Ch.13, 14

Task Due:

- ✧ Assignment 1 (Project survey questionnaire)
- ✧ Every team must have a Qualtrics questionnaire ready online.

W, 05/09

Midterm Exam

Readings:

- ✧ All material up-to-date

Project Status:

- ✧ Pretest survey questionnaire, start survey data collection

-----Week 7-----

M, 05/14

Fundamental Data Processing

The class will be held in computer lab (Chiles 323)

Readings:

- ✧ MG Ch.15
- ✧ SPSS Ch.4,5, and 8

W, 05/16

Statistical Testing of Differences

The class will be held in computer lab (Chiles 323)

Readings:

- ✧ MG Ch.16, SPSS Ch.6, 12-15

Tasks Due:

Assignment 2 (Frequency, Descriptive Statistics, Cross-Tab)

Project Status:

- ✧ Collect survey data

-----Week 8-----

M, 05/21

Bivariate and Multiple Linear Regression

The class will be held in computer lab (Chiles 323)

Readings:

- ✧ MG Ch.17, 18 (pp.596-606), SPSS Ch. 20, 21, 23

W, 05/23

Cluster Analysis

The class will be held in computer lab (Chiles 323)

Readings:

- ✧ MG Ch.18 (pp.610-616)
- ✧ Cluster Analysis for Segmentation, Darden Business Publishing, UV0745 (It is in the Harvard Business course pack)

Tasks Due:

Assignment 3 (T-test, ANOVA, Regression)

Project Status:

✧ Collect survey data, and start to analyze the data

-----Week 9-----

M, 05/28 **No Class, Memorial Day Holiday**

W, 05/30 **Analytical Assignment Review and Project Data Analysis**

The class will be held in computer lab (Chiles 323)

Project Status:

✧ Analyze survey data, prepare term project presentation

-----Week 10-----

M, 06/04 **Term Project Presentation**

Project Status:

✧ Draft term project report

W, 06/06 **Term Project Presentation**

Task Due:

✧ Term project report

-----Week 11-----

Final Exam

Details to be announced

The following articles are downloadable from the UO library databases.

- ✧ Anderson, Ethnographic Research: A Key to Strategy, *Harvard Business Review*, March 2009
- ✧ Burke, Virtual Shopping: Breakthrough in Marketing Research, *Harvard Business Review*, March-April 1996



OREGON MBA STRATEGIC PLANNING AND CONSULTING PROJECTS



The capstone of the Oregon MBA, the Strategic Planning Project (SPP) provides the opportunity to take on real issues at a real-life business or organization.

Matched with one of our industry

partners, MBA students work as a team, tackling matters of strategic importance. They make site visits and attend meetings. A nondisclosure agreement gives them access to proprietary information.

Wherever the company sees an opportunity for growth or has a problem with an existing product line or service, the MBA student team will analyze the case and present its conclusions to senior management.

Depending on the track, SPP commences in the winter term of students' second year and concludes at the end of spring term. From industry and competitor analysis to project definition, market research, and data analysis, students move at business speed. They have less than five months before they have to spell out their conclusions. After rehearsing in front of communications coaches and faculty experts, MBA student teams sell their recommendations—and themselves!—to key executives at their client.

Our MBA students have worked with every kind of business: multinational giants, national brands, and many of the regional companies that play a key role in the Pacific Northwest economy.

Note: finance and securities analysis track students do not participate in SPP, but instead manage the [Emerging Markets Fund](#) portfolio. Innovation and entrepreneurship track MBAs who qualify for business plan competitions may also elect the [Venture Launch Pathway](#) in lieu of the Strategic Planning Project.

Project Partners

Companies that have teamed up with Oregon MBAs for consulting or strategic planning projects include:

- adidas
- Amazon.com
- Bank of America
- Chinese Olympic Committee
- Chinus Asset Management
- Clif Bar
- Columbia Sportswear
- Cranium
- Deschutes Investment Advisors
- Dolphin Software
- EA Sports
- ESPN
- EWEB
- Ferguson Wellman Capital Management
- Flexcar
- Forrest Paint
- Freightliner
- gDiapers
- GMR*Works
- Hewlett-Packard

Some of the projects addressed:

- Optimal expansion markets for energy distributor
- Integration of newly acquired product lines
- River-based alternative to waste hauling
- New seat-licensing system for sports franchise
- Brand promotion through sale of licensed products
- Cash flow accounting for retailer
- Marketing plan for educational services NFP
- Web-based catalog for medical supplier
- Supply chain management for manufacturer
- Channel marketing for wholesaler
- A sustainability baseline and action plan for an organization

- Iditarod
- IMG
- Intel
- KEEN Footwear
- Kettle Foods
- Marmot
- Mountain Rose Herbs
- NBA
- NEDCO Sprout!
- Neil Kelly
- Nike
- Oakland Raiders
- Oakshire Brewing
- Oregon Scientific
- Pacific Gas and Electric
- Portland Timbers/Thorns
- Portland Trailblazers
- Safeco Insurance
- San Francisco 49ers
- Seattle Seahawks
- SeQuential Biofuels
- University of Oregon Athletics
- US Bank
- U.S. Olympic Committee
- VISA International
- Wells Fargo
- Xerox
- Yakima

In-Class Projects

In addition to Strategic Planning Projects, Oregon MBA students across all tracks complete consulting projects during their regular coursework. Many of our faculty use the ten-week length of courses to support sharply focused projects. There are literally dozens of in-class consulting projects completed each each year across all Oregon MBA tracks.

Independent Consulting Projects

Our students are always eager to tackle new challenges and interesting projects. Each year we have a number of students who take on projects as an independent consulting effort or as an independent study for class credit. Not only are such projects supported, they are actively encouraged.

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Sports Product Management – Integrative Project

SBUS 609

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Concept and Vision: The Integrative Project is a capstone experience that ties together all of the aspects of Sports Product Management Graduate Degree. As such, it is a required element of the program. While it formally lives as a course in the final term of the program, term 6, it arches over the entire program. In term 1, students are assigned teams based on their interest in footwear, apparel or gear. These teams will involve students from the SPM Graduate Program as well as students from the new 2-year Master's in Product Design. During the ensuing six terms, each team will manage a full product development cycle and earn 12 credits.

Integrative Project Concept Design: Once students are assigned teams, they will

1. Choose a product-market
2. Develop a product concept for that product-market
3. Analyze the product-market (conjoint) to understand value drivers and price sensitivity
4. Determine the magnitude of this new product opportunity (current and potential market demand)
5. Develop product specification target consumer markets
6. Design a product to meet those target market needs (price, performance, etc.).
7. Produce a fully functional prototype in the White Stag Innovation Lab and AAA Labs
 - a. A number of production workshops will be given throughout the program. It is expected that teams will take those workshops necessary for production of their prototype in the labs. The subset will differ for each product under development
8. Test their prototype with consumers in the program sports product retail store.
9. Develop plans for mass production, cost estimates, inventory & supply chain costs, retailing, and anticipated market penetration, sales and profits over time.

Project Funding and Sustainability: The Integrative Project draws heavily on the Innovation Lab and Innovation Store. They are described separately. Beyond those high cost elements, a single instructor organizes the process over the six terms. During most terms, a panel of industry professionals and faculty carry out design reviews for each team related to the curriculum of that term. The professionals come at no cost and we hope the faculty will participate for expenses and small honoraria. Hence, the sustainability of the Integrative Project rests in the viability of the Innovation Lab and Innovation Store. See their respective white papers for details.

Integrative Project Benefits: The Integrative Project is highest level of experiential education, creating and implementing. The Integrative Project will provide a framework linking courses across the program. In each term, the concepts of courses will not only be applied to traditional classroom exercises, but will be applied immediately to a teams' thinking on their Project.

Students will also benefit greatly from working on teams including both business and product design students. They will come to experience all the skills necessary to complete a product design cycle.

Across the program, each team will stand before several panels to get feedback on its thinking to date. Each panel will concentrate on the issues of emphasis in the current term (strategy, design, operations, etc.). Some panels will

consist of instructors. Others will involve experts from the SP industry. The final grade will be developed based on expert judgment of the quality of decisions at each stage in the process.

Such intense team projects also serve to teach teamwork. Some teams will naturally flourish. Many will develop dysfunctionalities that serve as excellent teaching moments. Team Doctors will be available to work with teams to overcome issues that arise.

Implementation: We plan to run the first year with a smaller group as a beta test of the overall concept. The students will be helping revise and solidify the model as they go through it. They will be rewarded with a uniquely integrative experience and scholarship for the service. We will build on experience with a similar course at the University of Michigan, adapting it for the sports product industry (<http://www.tauber.umich.edu/News%20and%20Events/IPD/>).

Performance Expectation: It is expected that each student in the course will participate fully in a full product design cycle typical of the sports product industry. This experience will give them the ability, in their permanent jobs, to anticipate the impacts of their decisions across the product design spectrum.

SBUS 610
Sports Product Syllabus
University of Oregon
Winter 2014
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Course Objectives:

- Learn the companies, and organization of the international sports product industry alpha cluster based in Oregon; footwear, apparel and equipment.
- Learn the sports product process from innovation through manufacturing
- Learn how a sports product company runs a brand and business.
- Learn both the retail and wholesale parts of the sports product industry.

Grading:

BSG Simulation	50	Team
BSG Quiz	25	Individual
BSG End of Game Report	50	Individual
HBR Case Analysis/Business Article Discussion	50	Team
Retail Exercise	50	Individual
Mid-term Exam	100	Individual
Final Report	125	Individual
Class Attendance/Participation	<u>50</u>	Individual
Total Points	500	

Shoe Business Simulation: In the Business Strategy Game (BSG), all class members divide into management teams of 4-5 people and are assigned to run an athletic footwear company in head-to-head competition. Companies compete in a global market selling branded and private-label athletic footwear in four geographic regions.

For each team, the challenge is to execute competitive product strategies to build your company brand and business. All companies' start with the same standing, and there is freedom to approach any market position. (e.g. premium, low-end, sustainable, etc.)

Each team must assign a position to each person on the team. (e.g. CEO, VP Marketing, VP Sourcing, VP Finance, VP Sales, VP Product, etc.) You will be asked to meet as a team face-to-face for the first four decision points, and virtually the last four decision points. You will build a line plan, brief products, cost products, execute go-to-market strategies, sign product endorsement contracts, etc. Please play the game in your role(s).

You will be evaluated in the following areas:

- 1) Your final company score (ranking)
- 2) Short quiz - understanding the game.
- 3) End of game report per individual.

Final BSG Report: (500 words- 2-3 pages)

Name your position in the company.

Give a brief overview of participating in the game in this position.

Describe what it was like to work face-to-face and virtually on this team. What techniques did you use to discuss the game? What worked/what didn't work?

Describe your outcome in the game. Give 3 reasons why you accomplished your results.

What would you do differently now?

Case Study or business article: Each team will need to choose one case study or business article to analyze. Everyone needs to read each article and be ready to contribute to the other five class discussions.

Readings:

1. Case Study: Nike's Global Women's Fitness Business: Driving Strategic Integration by Robert Burgelman and Lyn Denend, publication 2007
2. Case Study: Nike Football: World Cup 2010 South Africa, by Elie Ofek, Ryan Johnson, publication, June 30, 2011
3. Case Study: Homeless World Cup: Social Entrepreneurship, Cause Marketing, and a Partnership with Nike by George Foster, Jocelyn Hornblower, Norm O'Reilly, publication 6/4/2010.
4. Paper: Mass Customization at Adidas: Three Strategic Capabilities to Implement Mass Customization by *Frank Piller, Evalotte Lindgens and Frank Steiner, RWTH Aachen University*, publication January 29, 2012
5. Case Study: Icebreaker: The US Entry Decision, by Dan Heath, Joseph B. Lassiter Source: Harvard Business School, publication date: 6/17/2006
6. Article in R&D Management: The paradox of tie strength in customer relationships for innovation: a longitudinal case study in the sports industry:adidas Tobias Fredberg, Frank T. Piller (Volume 41, Issue 5, pages 470-484, November 2011)

HBR case study analysis:

- Basic information about the company, industry, or project featured in the case study.
- An analysis of the company's history and growth.
- A summary of the company's strengths and weaknesses.
- Responses and results of the company's current business strategy and recommendations for strategies to use in the future.

Business Article/Paper:

- Basic information about article.
- An analysis of the industry or issue.
- Answer questions at the end of the article.

Mid-Term exam - Industry terms as well as concepts from the first half of the class will be tested in a 90-minute exam

Final Project- Pick a sport you love and a Sports Product company you have worked for or would like to work for in the future. Pick one consumer/athlete insight (product strategy) to follow from innovation to market. The concept needs to be something real or something you want to take to market. (Examples: Fly-knit at Nike, Omni-Tech at Columbia, Industrial at Keen, etc.)

- Minimum of two interviews with the company you are researching.

- Minimum of 5 secondary sources.
- Final Project- maximum 1500 words (4-6 pages). Include Pictures, graphs diagrams
- Paper to include:
 1. Consumer insight/Athlete insight- who is the target audience?
 2. What problem are you trying to solve?
 3. Market: Size of market, other competitors in this market, domestic and/or international potential
 4. How will your company protect this insight/technology? (e.g. patent, exclusive vendors, etc.)
 5. Pricing of products. How did you determine your price?
 6. Where are the products being sourced/made? Why?
 7. Is this high margin or low margin business? Why?
 8. How will your product be marketed?
 9. Where is the product being sold?
 10. What did you learn through doing this project?

Class Attendance/Participation- Majority of your learning will come from attending and participating in the class discussions. You will have the opportunity to interact with industry executives from a variety of different companies. I will measure your participation in how you 'show up' for class, as well as the questions you ask and the questions you can answer.

Class Outline:

January 6, 2014 (Eugene)

Week 1

Introduction to the Course- Course Packet

- Course Overview-outline and expectations
- Business Strategy Game introduction
- Review of Sporting Goods Industry glossary
- Each team to choose a case study for analysis
- Sports Product Resources available via University Libraries

History of the Sports Product and Outdoor Industry

- Where did it start?
- Why did it come to Oregon?
- What does the industry look like today?

BSG: Practice Round

- We will work on this together in class.
- Teams assigned, begin the process of understanding the game.

January 13, 2014 (Eugene) Monday

Week 2

How do Sport Product Companies work with Athletes?

What is the importance of materials and innovation for sports product companies?

- What is Product Marketing? Brand marketing?
- What is Product Merchandising?
- What is a Product Team?
- What does the product process look like?
- How do athlete insights drive innovation in sport product companies?

Case Study: Icebreaker: The US Entry Decision, by Dan Heath, Joseph B. Lassiter

Guest Speaker-Tony Le -Nike Materials Innovation and athletes

BSG: Quiz and Round 1

January 20/21, 2014 (NYC) Monday/Tuesday

Week 3

Monday

Tuesday

Merchandising/Marketing /Sales

Retail Tour- Ellen to lead

NIKE Showroom and/or Columbia

Sell-In process

Retail Merchandising

Brand management

Demand Creation

Trend analysis

January 31, 2014 (Portland) Friday

Week 4

Product Marketing and Product Merchandising

- Presentations from NYC

Guest Speaker: Kelly Hibler- VP Basketball-Nike

Corporate Responsibility

- Mercy Corps Project with Columbia Sportswear
- Re-use-a-shoe program

Case Study: Homeless World Cup: Social Entrepreneurship, Cause Marketing, and a Partnership with Nike by George Foster, Jocelyn Hornblower, Norm O'Reilly

Guest Speaker: Scott Welch-Director Community Outreach- Columbia Sportswear

BSG: Round 2

February 3, 2014 (Eugene) Monday

Week 5

Customization

- Mass manufacturing Vs. individual manufacturing

Paper: Mass Customization at Adidas: Three Strategic Capabilities to Implement Mass Customization by *Frank Piller, Evalotte Lindgens and Frank Steine*

Midterm Exam

BSG: Round 3

February 10, 2014 (Eugene) Monday

Week 6

Consumer/Market Trends

- What services are used by the brands to predict the future?
- What is the trends being predicted?
- Why are youth so important to this industry?

Guest Speaker: Sam Baker- LubDub Experience Designer

BSG Round up- Focus on the simulations. What is working/not working.

BSG: Round 4

February 17, 2014 (Eugene) Monday

Week 7 **Innovation**

- From insight to market
- adi-zero

R&D Management Article: The paradox of tie strength in customer relationships for innovation: a longitudinal case study in the sports industry
Tobias Fredberg¹, Frank T. Piller

Guest Speaker: Elysia Davis- Adidas Innovation

BSG: Round 5

February 24, 2014 (Eugene) Monday

Week 8 **Women's Business**

- Case Study: Nike Global Women's Fitness Business by Robert Burgelman and Lyn Denend
- How does a category team work?
- How does a product team work?
- Are athletes as important in the women's business?

Sustainability

- What is the system's approach?
- What defines sustainability for sports product companies?
- What difference can we make?

Guest Speaker: Darcy Winslow-former NIKE Women's Fitness GM,
senior Lecturer MIT

BSG: Round 6

March 3, 2014 (Eugene) Monday

Week 9 **Product Creation & Manufacturing**

- Sourcing at Sports Product companies
- Partnership approach
- Price, Quality, Delivery, Sustainability

Guest Speaker: Steve Bence-Nike

BSG Game Final Round

March 10, 2014 (Eugene) Monday

Week 10 **Brand**

- How important is the Brand to sell Sport Products?
- Why is the Brand important?
- Case Study: Nike Football: World Cup 2010 South Africa, by Elie Ofek, Ryan Johnson

BSG Game-Results, Awards, Discussion

March 17, 2013: Monday

Week 11 **Final Paper Due- submit electronically by 5pm**