



University of California, Santa Barbara  
College of Engineering

## **Industry Analysis in the Telecom/IT Space**

**ENGR 193/293B, Winter 2008**

**Course website:** [www.tmp.ucsb.edu/winter08/engr193b](http://www.tmp.ucsb.edu/winter08/engr193b)

Professor Jill E. Feldman

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CLASS: Tuesday, 6:00 – 7:50 p.m.

CLASSROOM: Webb Hall, RM 1100

OFFICE HRS: Tuesday 4:30-5:30 p.m.

OFFICE HRS HELD IN: Trailer 937, Rm 1007

Industry Analysis in the Telecom/IT Space provides a high-level view of key analysis and management skills needed in today's competitive business environment. This course will enable the motivated business and technology-oriented student to conduct detailed competitive, market and industry analyses, focusing on companies in the telecom and IT space and their unique competitive, regulatory and standards-related issues.

The course will begin with a brief introduction and be followed by presentations from UCSB faculty (our Industry Analysis Project Partners) identifying IT and telecom companies that will be used throughout the course in our Industry Analysis Group Projects. We will spend the majority of our time skill building - learning the techniques needed to complete the industry analysis - through a combination of assigned readings, seminar lectures, a "field trip" to the library, guest lecturers and case studies. Case studies will be drawn from current IT and telecom companies and will provide an opportunity to apply some newly learned industry analysis skills, including Porter's Five Forces Model and SWOT analysis tools.

The course will culminate in student-led group presentations, with each group presenting their industry analysis of a company which had been introduced by one of our UCSB Project Partners at the beginning of the course. The student teams will apply industry analysis skills learned throughout the course to prepare their presentations. The group projects will be reviewed by a panel, with representation from industry and the UCSB Project Partner, and feedback will be provided. In addition to acquiring analysis skills learned throughout the course, students will benefit from working in teams and constructively contributing to our class discussions.

## CASES AND READINGS:

**Required (Look on Amazon as well the bookstore. Also available on the Harvard Business Online website and included in our Harvard Business School Case packet.)**

*The Case Study Handbook: How to Read, Discuss and Write Persuasively About Cases*, William Ellet, Harvard Business School Press, 2007

“*Industry Analysis in the Telecom/IT Space*” case pack of Harvard Business School cases and readings accessed through this website:

<http://harvardbusinessonline.hbsp.harvard.edu/relay.jhtml?name=cp&c=c68548>

**Additional Resources (suggested but not required):**

“Competitive Strategy: Techniques for Analyzing Industries and Competitors”, Michael E. Porter, The Free Press, 1980

## Grading and Assignment Instructions

### GRADING:

Class attendance and participation	35%
iPhone vs. Cell Phone Case Discussion	5%
The Future of the Web Case Essay and Discussion	10%
Aiming for an Evolutionary Advantage Case Essay and Discussion	10%
Industry Analysis Group Project report and presentation	40%

**ATTENDANCE IS MANDATORY:** I expect you to attend all scheduled classes and to arrive on time for each class. If you do not attend, you cannot participate. Absences will affect your participation grade negatively.

### EVALUATION OF PARTICIPATION

Your participation is vital to the success of our course. The ideal student will contribute to class when he or she has something useful and relevant to add. Students who attend class but do not participate in the class discussion **should expect to receive only a passing grade in the course.**

**WRITTEN ASSIGNMENT POLICY:** All written assignments must be typed and handed in at the beginning of class on the day when the assignment is due. Please keep an extra copy to use during that day's class discussion.

**WRITTEN REPORTS:** Reports should be typed in 12 point font, double-spaced, with margins 1" all around.

### ACADEMIC INTEGRITY

Academic integrity is an essential element of a high-quality educational experience and is expected in this class. Academic integrity includes respecting the letter *and the spirit* of the class rules. The rules are designed to maximize the learning experience for all students, preserve the integrity of the class, and to help you practice the high level of integrity expected from consultants, professional managers, and corporate officers. Feel free to contact me with any concerns regarding practices and behaviors related to this course that appear to be lacking in academic integrity.

University policy has defined as academic dishonesty the following behaviors: (1) using materials published in print or over the Internet in your papers without proper reference to the original source; (2) consulting students who have already taken the course about analysis and answers to cases or assignments prior to their due date; (3) working with others on individual assignments; and (4) working with non-team members on team assignments. Please do not share written or electronic notes, outlines, or "key points" across groups because papers that are judged to be substantially similar in content will be submitted to the University committee for academic integrity. By upholding the standards of academic integrity together, we will strive to preserve the quality of your educational experience and the value of your degree.

**INSTRUCTIONS FOR HARVARD CASE PACK FOR:  
“INDUSTRY ANALYSIS IN THE TELECOM/IT SPACE”**

I have created a course area on the Harvard Business Online website where you can order the required materials for this course.

Click on the link below to order the course materials.

<http://harvardbusinessonline.hbsp.harvard.edu/relay.jhtml?name=cp&c=c68548>

If you have not registered with Harvard Business Online, you will be required to do so. This URL will provide you with a list of required materials for use in this course.

Note that product formats may differ; some may require that a hard copy be shipped to you via air mail. Electronic course materials are in PDF (Portable Document Format) and should be viewed with Adobe Reader, available free at [www.adobe.com](http://www.adobe.com). Students can access PDF files of course materials via a link on Harvard Business Online for six months from the date of purchase.

You will have immediate access to the materials upon placing your order, for subsequent access, you must login to <http://harvardbusinessonline.org>

I hope you find this a convenient way to access your course materials.

For technical assistance, please view the [Quick Tips](#) section or contact Harvard Business School Publishing at 1-800-810-8858 or 617-783-7700. They are open 8am-6pm Eastern Standard Time. They can also be reached at [techhelp@hbsp.harvard.edu](mailto:techhelp@hbsp.harvard.edu)

Thank you.

Course Information

Course Name: Industry Analysis in Telecom/IT

Course Number: Engineering 193/293B

Course Level: NON\_BUS\_GRAD

Course Start Date: 01/2008

Expected Enrollment: 25

Reference Code: c68548

Professor Display Names: Jill E. Feldman, Anne Berman

Student Access URL:

<http://harvardbusinessonline.hbsp.harvard.edu/relay.jhtml?name=cp&c=c68548>

**ENGR 193/293B**  
**Industry Analysis in the Telecom/IT Space**  
**Course Outline and Schedule (Winter 2008)**

**Tuesday, January 8, 2008 – Week 1**

**In this week's class:**

Course introduction and explanation of course requirements  
Introduction to Industry Analysis Group Projects and UCSB Project Partners

**For next class:**

Prepare for next week's UCSB Industry Analysis Group Project presentations (read class handouts, question preparation)  
Read chapters 1, 2 and 3: *The Case Study Handbook: How to Read, Discuss and Write Persuasively About Cases*, William Ellet, Harvard Business School Press, 2007  
Read "Understanding Industry Structure", Porter (HBS 9-707-493)  
Read "How Competitive Forces Shape Strategy", Porter (HBR 79208)

**Tuesday, January 15, 2008 – Week 2**

**In this week's class:**

Presentation by UCSB Partner for Industry Analysis Group Project  
Discussion of Porter's Five Forces Model

**For next class:**

Prepare for next week's UCSB Industry Analysis Group Project presentations (read class handouts, question preparation)  
Read case "Malaysia in the 1990s (A)" (included in Part IV of text) and chapters 4, 8 and 9: *The Case Study Handbook: How to Read, Discuss and Write Persuasively About Cases*, William Ellet, Harvard Business School Press, 2007  
Read "SWOT Analysis I: Looking Outside for Threats and Opportunities" (HBSP 5528BC)  
Read "SWOT Analysis II: Looking Inside for Strengths and Weaknesses" (HBSP 5535BC)

**Tuesday, January 22, 2008 – Week 3**

**In this week's class:**

Presentation by UCSB Partner for Industry Analysis Group Project  
Discussion of Porter's Five Forces Analysis using VoIP industry

**For next class:**

Read "Note on the Structural Analysis of Industries", Porter (HBS 9-376-054)  
Read "iPhone vs. Cell Phone" (HBS 9-708-451) and prepare for discussion on this case

**Tuesday, January 29, 2008 – Week 4**

**In this week's class:**

**MEET AT LIBRARY** (Room 1414C) for library field trip: Utilizing the UC library system for industry, competitive and market analysis

**For next class:**

Re-read “iPhone vs. Cell Phone” (HBS 9-708-451) and prepare for discussion on this case

**Tuesday, February 5, 2008 – Week 5**

**In this week's class:**

Guest lecturer: “The Future of Telecom”

Discussion of SWOT Analysis

Begin iPhone vs. Cell Phone case discussion

**For next class:**

Read “Assessing a Firm's Future Financial Health” (HBS 9-201-077)

Read “The Future of the Web” (SMR242) and prepare for case discussion

**Tuesday, February 12, 2008 – Week 6**

**In this week's class:**

Finish iPhone case discussion

Financial ratios and financial analysis discussion

Begin case discussion: “The Future of the Web”

**For next class:**

Re-read “The Future of the Web” (SMR242) and write a 2 – 3 page case analysis

Read “Competitor Analysis: Understand Your Opponents” (HBSP 2572BC)

Read “Competitor Analysis: Anticipating Competitive Actions”, Coughlan and Lee (HBS 9-701-120)

Read “Analyzing Consumer Perceptions”, Dolan (HBS 9-599-110)

Read “Note on Marketing Strategy”, Dolan (HBS 9-598-061)

**Tuesday, February 19, 2008 – Week 7**

**In this week's class:**

Finish “The Future of the Web” case discussion and hand in 2-3 page case analysis

Discussion of competitor analysis

Discussion of market research

Discussion of management consulting

**For next class:**

Read “Aiming for an Evolutionary Advantage” (HBSP 2515BC) and write a 2-3 page case analysis

**Tuesday, February 26, 2008 – Week 8**

**In this week's class:**

Case discussion: “Aiming for an Evolutionary Advantage” and hand in 2-3 page analysis

**For next class:**

Finalize Industry Analysis Group Project presentations

**Tuesday, March 4, 2008 – Week 9**

**In this week's class:**

Industry Analysis Group Project panel introductions

Team project presentations

Feedback on presentations

**For next class:**

1-2 page personal career statement: Your career goals in the next 5 and 10 years

**Tuesday, March 11, 2008 – Week 10**

**In this week's class:**

UCSB TMP recent alumni presentations

Careers and opportunities

Summary of team projects

Wrap-up