Course Overview
Interested in working in tech? Or working with tech firms in banking, consulting or accounting? Wondering if Netflix can keep spending money like it is? How Marriott can stand its ground against Airbnb? Why Sprint just can’t get back on its feet? Then come join us.

In this course, we will focus on seven eight sources of competitive advantage. Two are from strategist Michael Porter, and six are added for the purpose of this class.

- Cost advantage (low-cost leader; from Porter)
- Differentiation (providing differentiation sufficient to justify pricing above providers providing competitive products; also from Porter)
- Community / Ecosystem Advantage: for example, having more software developers on your OS or product
- Talent Advantage: having the best people in your organization (Bell Labs, Google)
- Process Advantage: being able to manufacture or distribute your product in some disruptive new way (such Dell and the PC)
- Data Advantage: having the best data set
- Channel Advantage: having more channel partners that can reach end customers than your competitors. Samsung’s success in smartphones in the US market is an example.
- Culture Advantage: why do some companies endure? Some of this comes down to culture.

Software needs hardware; hardware needs software. (A metaphor for life!) Similarly, networks and devices need content; content needs devices and networks. In this class we will look at content distribution and the blur between content providers and network providers; distribution and technology platforms; interoperability, network effects and standards.

This class will use a combination of strategy frameworks; microeconomic concepts (network effects, platforms, content production and distribution costs); marketing concepts (customer acquisition and segmentation; LTV) and business models (XaaS, free, freemium, etc). We will also look at “moonshots” as a means of solving large problems.

Teaching Method
This course will leverage case materials; current articles; our core text Information Rules; investor relations materials; selections from Idea Factory, the Master Switch and other readings; podcasts and videos as relevant. Active participation in class discussion is required.

Prerequisites
Familiarity with cost accounting, microeconomic concepts, marketing concepts and strategy frameworks will be helpful. Students must be third-year and above.

Grading
50% class attendance and participation; 30% individual papers (3 over the course of the semester); 20% final group presentation.

About the Instructor
Jon Metzler is a Lecturer at the Haas School of Business and lectures on IT Strategy and Japan in the undergrad and MBA programs. He has lectured at Haas since 2014. Outside of Haas, Jon consults to telecom carriers, device makers, infrastructure providers and media companies. He also has new business creation experience in print, events, wireless location, edtech, wireless broadband, online media and more. Jon is a Haas MBA/MA-Asian Studies alum and during his time at Haas co-founded the Berkeley Asia Business Conference. Jon can be reached at jon dot metzler at berkeley dot edu.