

A
PPENDIX

**Critical Timelines
of Real-World
Companies**

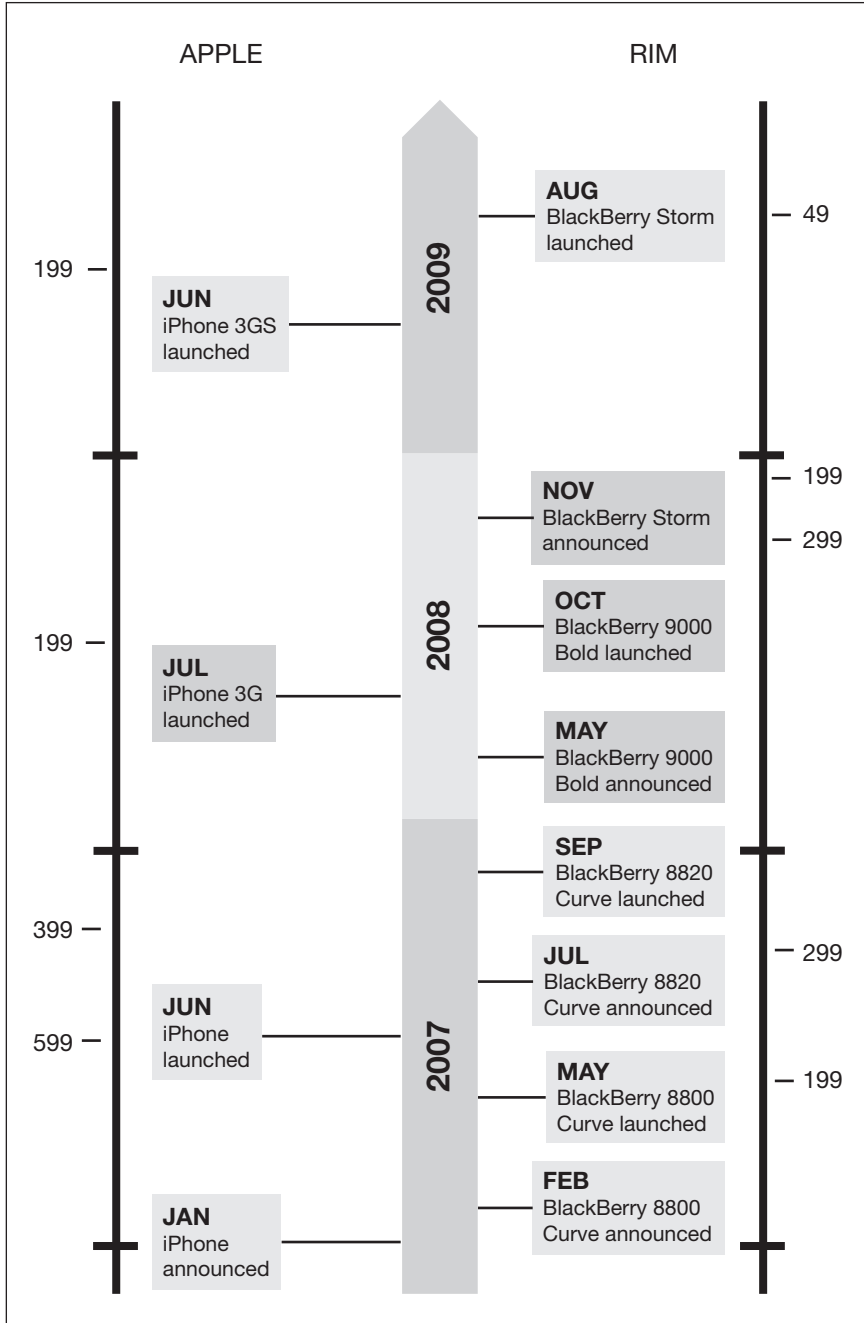
The following pages offer a selection of critical timelines (CTLs) that represent different companies as players across different markets-as-a-game. Each CTL identifies the game dimension in terms of the **geography** of the game and the **process**. The process includes product, technology or innovation, as defined from the discussion in the book — consumers do not buy products but functionalities or characteristics. For example, in the case of Starbucks, the process is the ‘coffee experience’ or for Geely, it is the technology acquired from Volvo. It could simply be the product, as in a can of Pepsi, but a broader definition facilitates a richer dataset of signals.

Each CTL was constructed during the case preparation at the MBA Workshops and the team affiliations for each case are credited in the Acknowledgements. The cases are a representative sample of analysis and include Apple, Geely, HSBC, Microsoft, Nissan, Nokia, Pepsi and Starbucks. In each case, the game dimension G is defined with respect to geography and process and a time period of five years. The objective is to identify a pattern in the signals and identify the near-rival — that competitor in the sum of competitors who is more likely to react first.

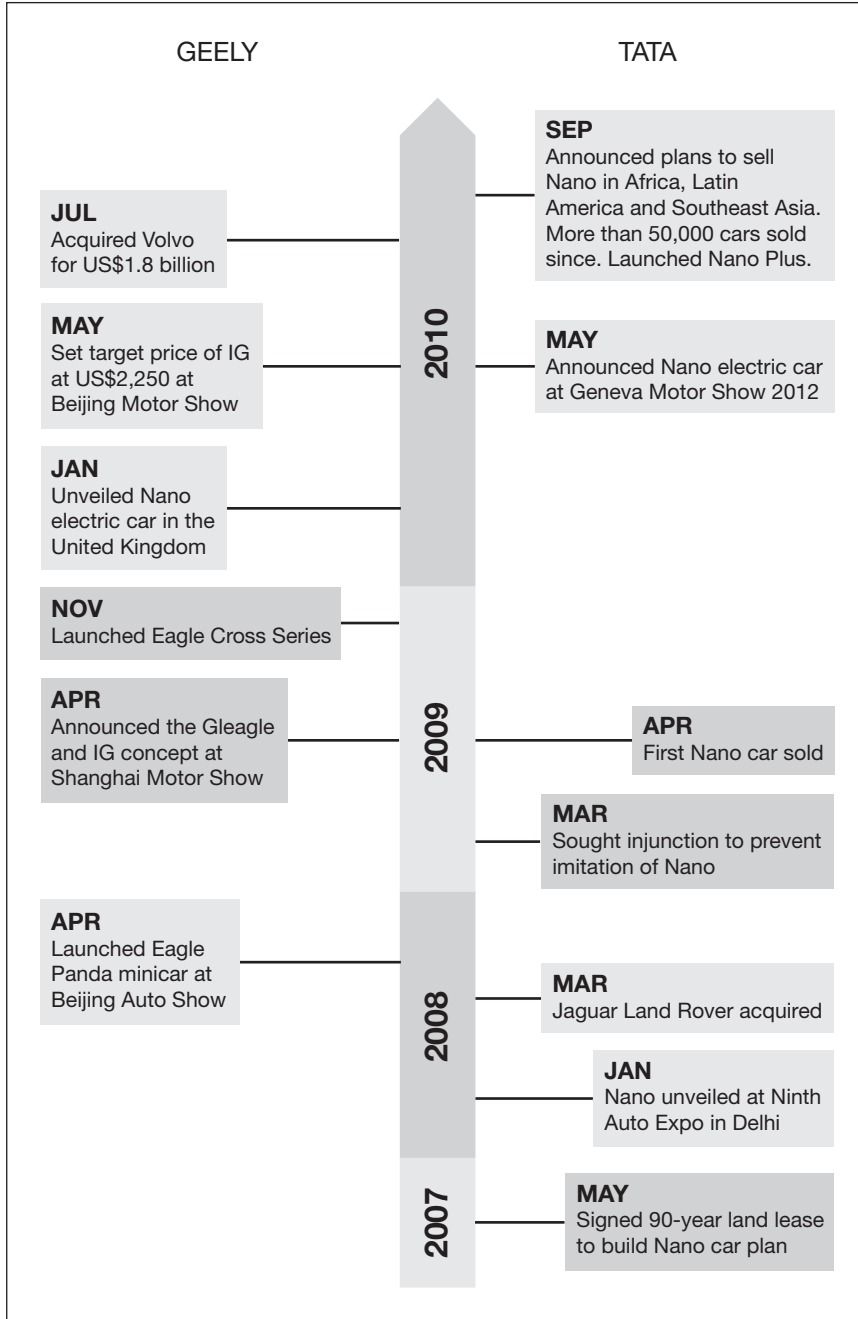
A game, G , occurs when Player A acts and Player B reacts. A sub-game, g , occurs when a sequence of moves appear reversed as Player A reacts to Player B. The sub-game can be observed in both the Microsoft and Pepsi CTLs. The decision tree in the Nissan case allows us to define an extensive form of the game as observed. The HSBC case includes the causality with the share price performance. Further examples of the casual link between CTLs and key performance indicators (KPIs) can be found on www.patrickmcnut.com in the icon ‘eLearning and Games Academy’.

The pattern observed provides an insight into the player’s strategy set, that is, the sequence of moves in the market-as-a-game. If the pattern observed is only a pattern of price signals, a Bertrand pattern has been observed; if the pattern does not include price signals, a Cournot pattern is observed. The research commitment can be intense; over three days of gathering market intelligence, each group assembles the collected intelligence into a CTL and presents a hypothesis.

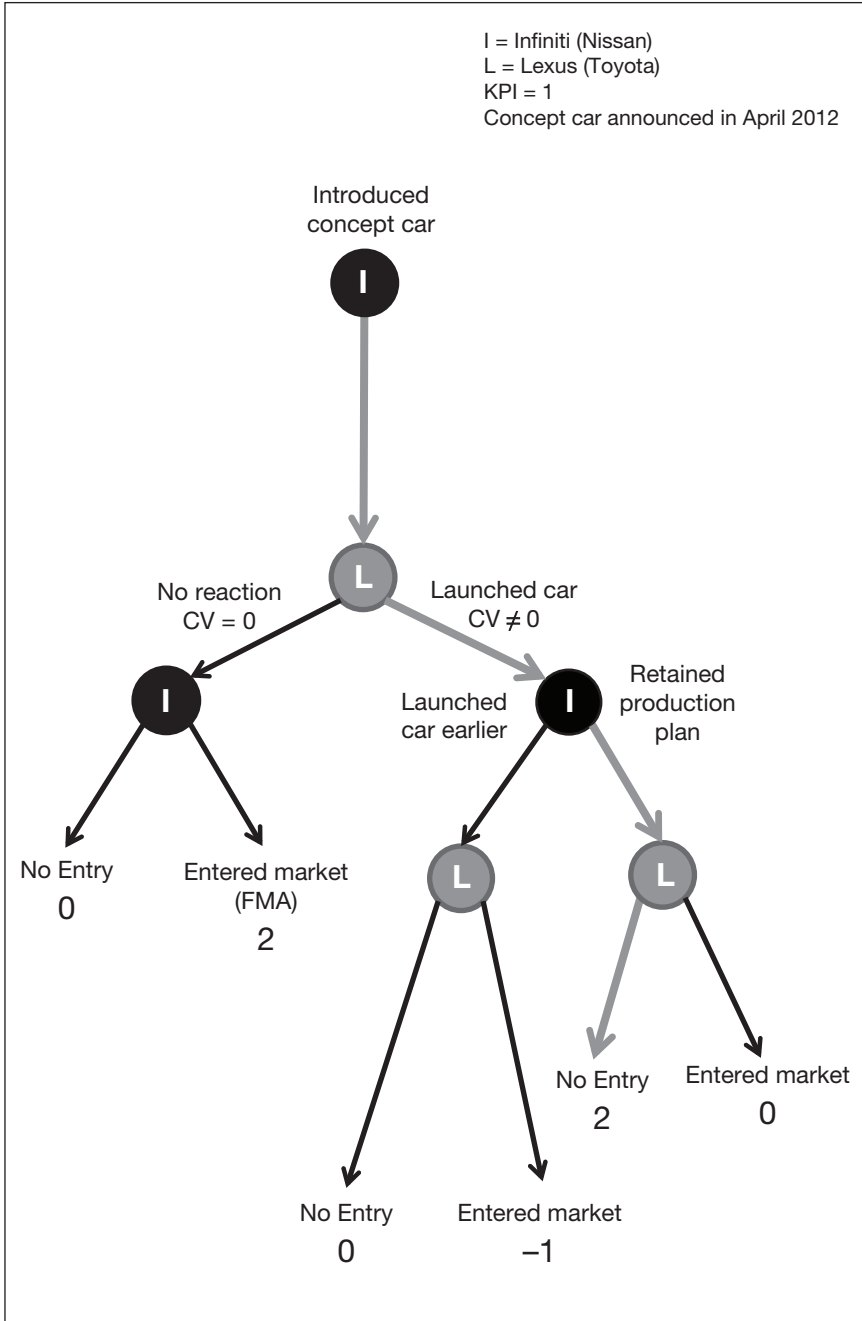
A1.1 – Apple vs RIM



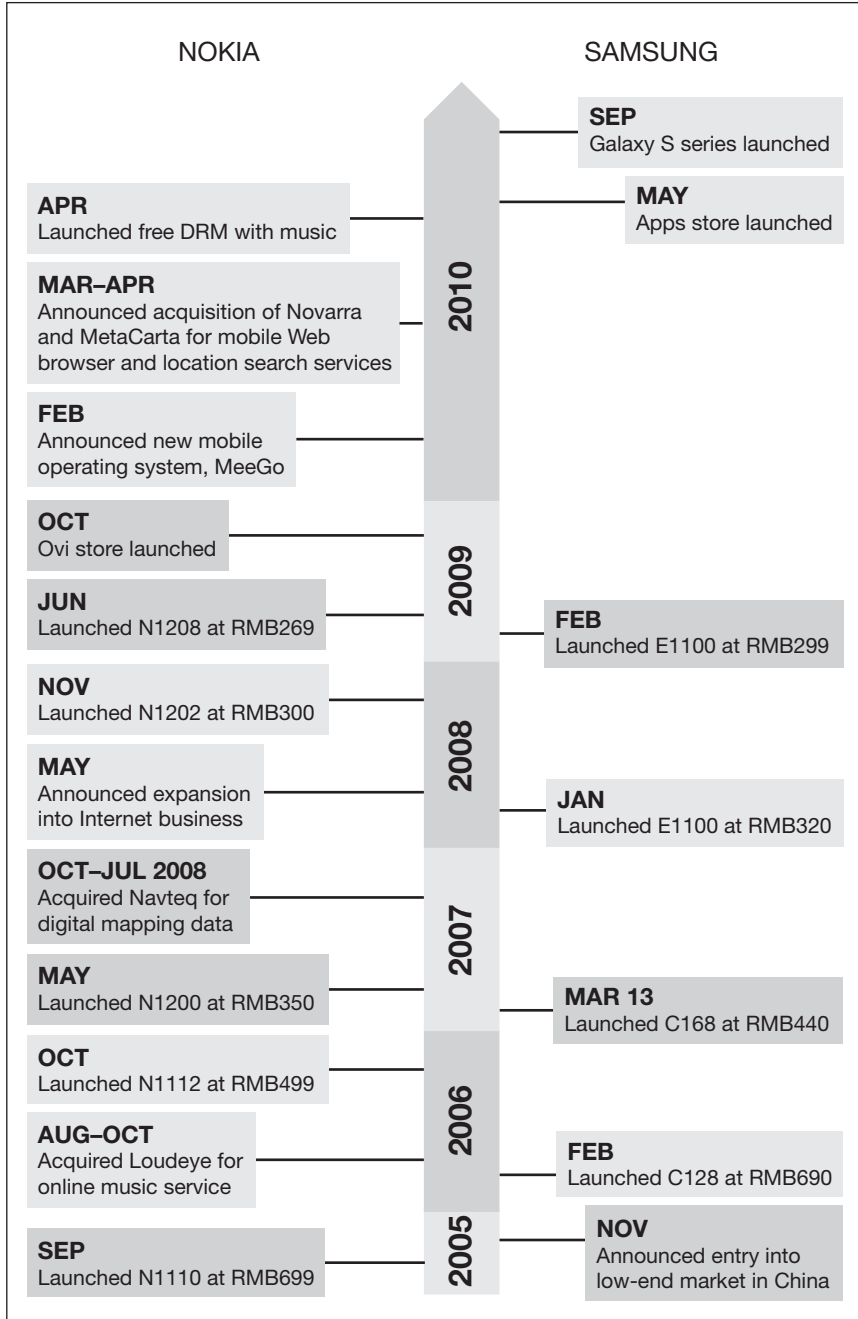
A1.2 – Geely vs TATA



A1.3 – Nissan vs Toyota (Decision tree)

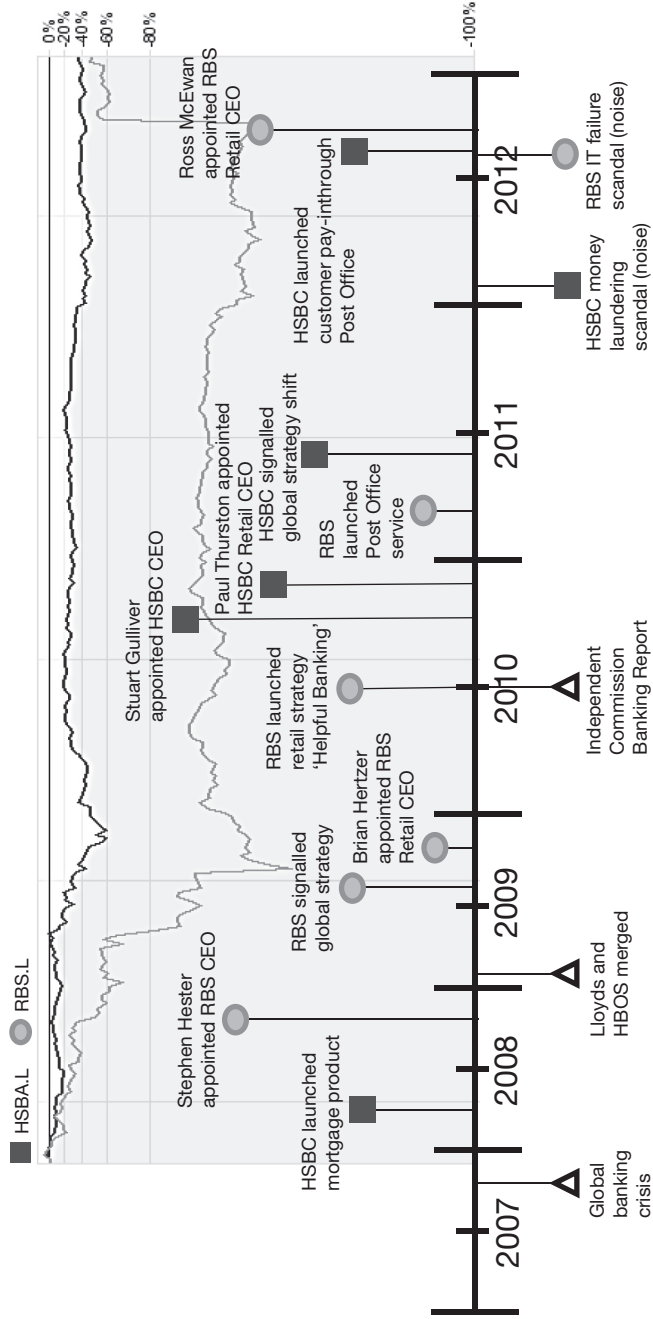


A1.4 – Nokia vs Samsung

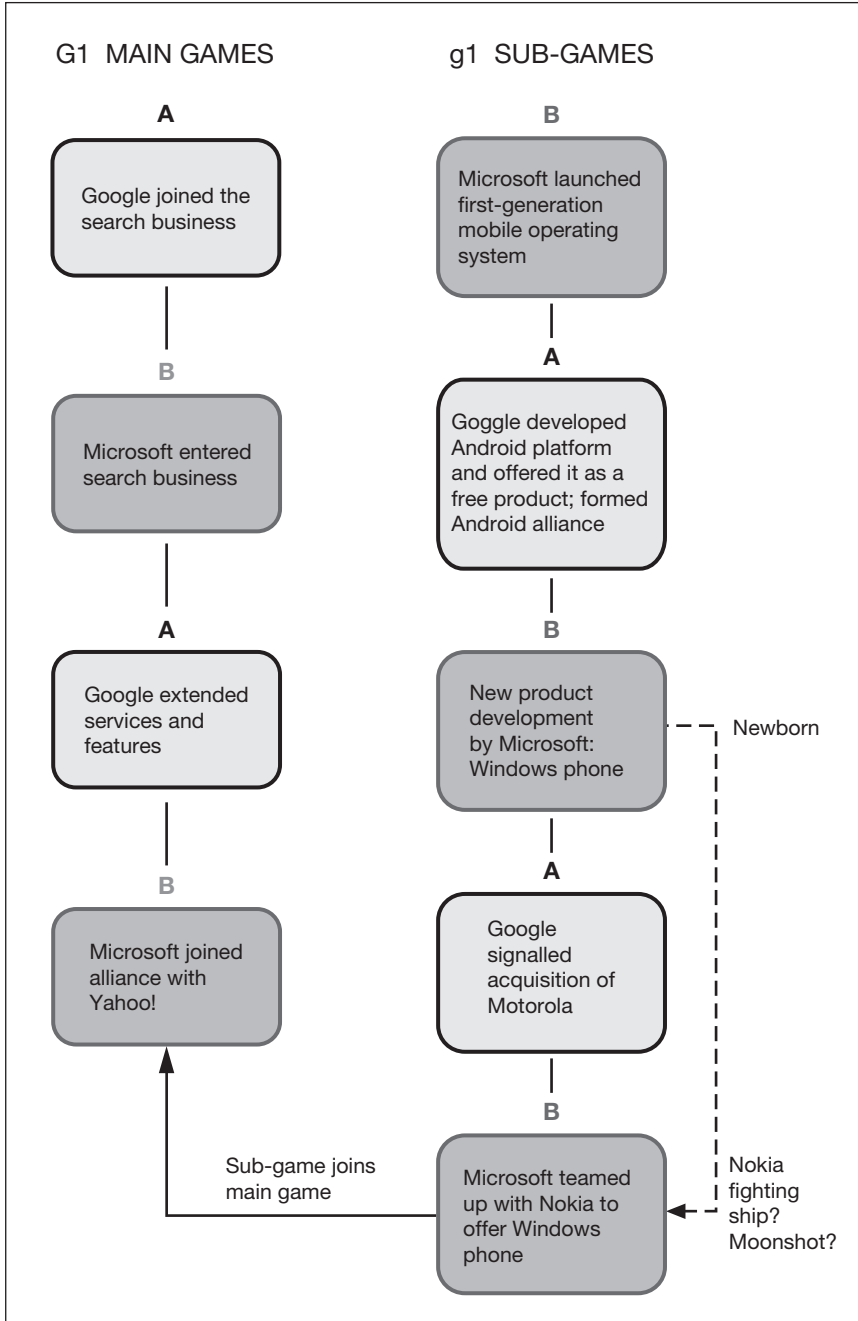


A1.5 — HSBC vs RBS (Time lag between key events for near rivals in the game)

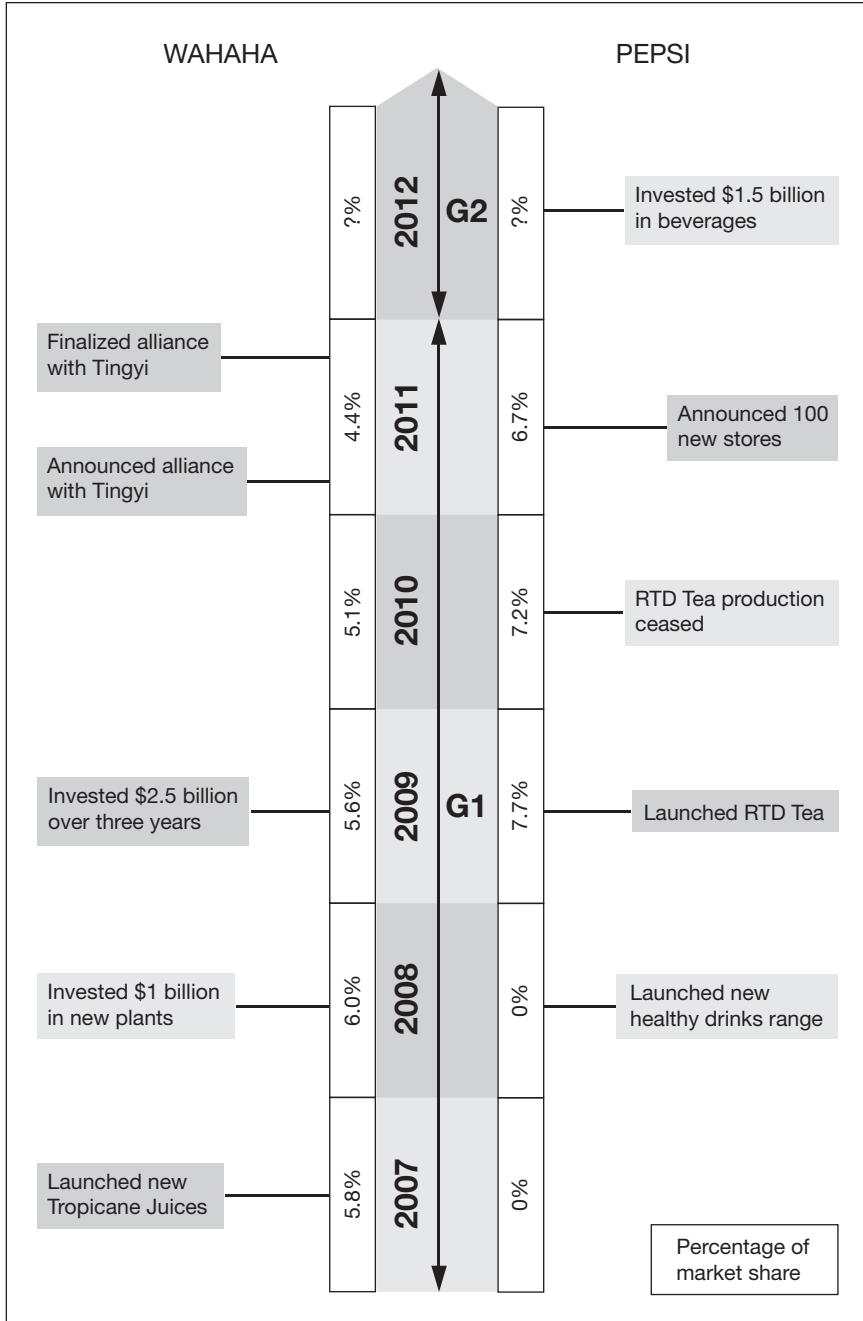
- Badly scarred by banking crisis, RBS was forced to make the first move and signalled cost leadership strategy.
- HSBC followed suit.



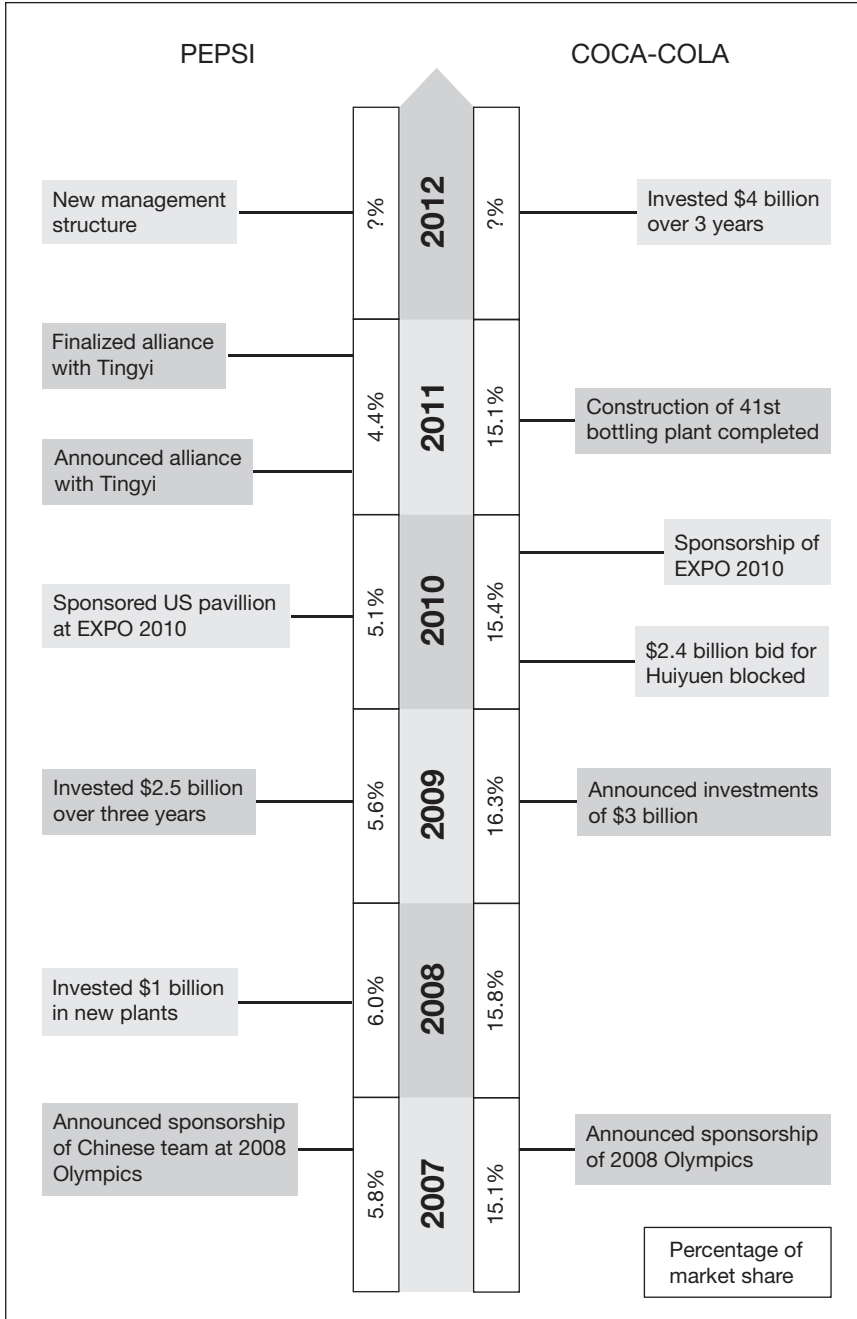
A1.6 – Microsoft vs Google



A1.7 – Pepsi vs Wahaha (Game G1)



A1.8 – Pepsi vs Coca-Cola (Sub-game g1)



A1.9 – Starbucks vs Nestlé

