2025-2026 COURSE CATALOG

UNIVERSITY of ROCHESTER | SIMON BUSINESS SCHOOL

Information in this publication is current as of October 2025 and is subject to change.

COURSE CATALOG

Academic Year 2025–2026

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Simon encourages the application of all qualified persons interested in the study of management at the master's and doctoral levels.

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CONTACT INFORMATION:
Registrar and Academic Operations
2341 Carol Simon Hall
Phone: (585) 275-8071

Office of Student Engagement
202 Schlegel Hall
Phone: (585) 275-8163

To view the current Academic Calendar, please go to:

https://simon.rochester.edu/registrar/academic-calendars/current-academic-calendars

While the study grids contained in this book are current for the 2025-2026 academic year, the arrangement of courses is subject to change.

MBA REQUIREMENTS AND CORE COURSE SEQUENCES

FULL-TIME MBA PROGRAM

To earn the Master of Business Administration degree, a full-time student must complete 68 credit-hours of study with a minimum 3.0 grade-point average. All students must take 12 required core courses, a project elective, two breadth electives, and a summer internship (or an approved alternative). The remaining credits will be fullfilled through electives. Any credit achieved to meet the summer internship requirement (GBA490) will not be counted towards MBA graduation credits. Much of the academic work in the MBA program will rely on computer based analysis and computer-assisted presentations. Upon entry to the program, faculty will expect students to have a working knowledge of spreadsheet, presentation, and word-processing software. The programs most widely used are Microsoft Excel, PowerPoint, and Word. Although not required, a student may complete a concentration or minor. Students can earn a STEM designation for their MBA, if 50% (34 credits) or more of the minimum credits required for the degree come from STEM designated courses. STEM designated courses are indicated with an asterisk (*) in this catalog. For more details on concentrations and minors please refer to pages 39-43.

CORE COURSES

ACC 401. Corporate Financial Accounting
*CIS 401. Information Systems for Management
*FIN 402. Capital Budgeting and Corporate Objectives
GBA 401. Structured Problem Solving
*GBA 411. Business Modeling
*GBA 412. Data Analytics
MGC 401. Professional Communication: Persuasion and Influence
MGC 402. Interpersonal Persuasion: Influence in Dynamic Interaction
MKT 402. Marketing Management
*OMG 402. Operations Management
*STR 401. Managerial Economics
*STR 421. Competitive Strategy

FULL-TIME MBA CLASS OF 2027
TWO-YEAR MBA PROGRAM: YEAR 1

<table>
<tr><th colspan="3">FALL SEMESTER</th><th colspan="2">SPRING SEMESTER</th><th>SUMMER TERM</th></tr>
<tr><th>PRE-FALL</th><th>FALL A</th><th>FALL B</th><th>SPRING A</th><th>SPRING B</th><th></th></tr>
<tr><td>*STR 401
Managerial Economics</td><td>ACC 401
Corporate Financial Accounting</td><td>*GBA 412
Data Analytics</td><td colspan="2">Project Elective
(3 Credits)</td><td rowspan="4">Required Internship</td></tr>
<tr><td>GBA 401
Structured Problem Solving
(1 Credit)</td><td>MKT 402
Marketing Management</td><td>Elective</td><td>*GBA 411
Business Modeling</td><td>*CIS 401
Information Systems for Management</td></tr>
<tr><td>GBA 400
Introduction to Probability for Finance
(0 credits)</td><td>*FIN 402
Capital Budgeting and Corporate Objectives</td><td>Elective</td><td>*OMG 402
Operations Management</td><td>MGC 402
Interpersonal Persuasion: Influence in Dynamic Interaction</td></tr>
<tr><td></td><td colspan="2">MGC 401
Professional Communication: Persuasion and Influence</td><td>Elective</td><td>Elective</td></tr>
<tr><td colspan="3">Fall Semester Credit Hours: 21</td><td colspan="2">Spring Semester Total Credit Hours: 18</td><td></td></tr>
</table>

TWO-YEAR MBA PROGRAM: YEAR 2

FALL SEMESTER		SPRING SEMESTER	
FALL A	FALL B	SPRING A	SPRING B
Elective	Elective	Elective	Elective
Elective	Elective	Elective	Elective
Elective	Elective	Elective	Elective
Fall Semester Credit Hours: 15		Spring Semester Credit Hours: 15	

Other Degree Requirements

- STR421 is a required class that must be taken in an elective slot.

Two electives must be selected from the following five listed below to satisfy the Managerial Breadth degree requirement:

- STR403 Organization and Strategy
- STR427 Organizational Behavior
- GBA435 Negotiation Theory and Practice: Bargaining for Value
- GBA439 Elements of Leadership
- GBA441Business Ethics and Corporate Social Responsibility

Project Elective must be selected from one of the classes below:

- *MKT441 Brand Management Workshop
- MKT450 Product Management Workshop
- FIN450 Investment Management and Trading Strategies
- CIS461 Strategy and Business Systems Consulting Practicum

All courses are 2.5 credits unless noted otherwise.

Minimum Degree Total Credit Hours: 68

FULL-TIME MASTER OF SCIENCE PROGRAMS

FULL-TIME MASTER OF SCIENCE IN ACCOUNTANCY

The program of study for the Master of Science in Accountancy is a lock-step program, which meets all the requirements for a STEM designated degree. Students take 11 core courses and 1 elective. A minimum 3.0 grade point average is required for graduation. STEM designated courses are indicated with an asterisk (*)

Assuming that students have met certain undergraduate prerequisites, this program has been designated by the New York State Education Department as fulfilling the 150 credit-hour requirement for professional education programs in public accountancy.

Students whose undergraduate programs do not satisfy all the assumed prerequisites will be advised of the additional courses that they must complete following a review of their undergraduate transcript. The New York State Education Department will have final approval upon application for licensure.

CORE COURSES

*ACC 410. Managerial Accounting and Performance Measurement
*ACC 411. Applied Financial Statement Analysis with Data Analytics
*ACC 417. Auditing
ACC 423. Financial Reporting I
ACC 424. Financial Reporting II
*ACC 438. Accounting Information Systems
*ACC 441. Gov/Nonprofit, Sustainable and Responsible Accounting
ACC 446. Accounting/FinTech
*ACC 447. Reporting Analytics in Financial Markets
BPP 433. Business Law and Policy
MGC 461. Professional Communication

ELECTIVE OPTIONS

*ACC 418. Taxes and Business Strategy
*ACC 439. Accounting Analytics for Forensics

OPTIONAL COURSES

ACC 437. Basic Federal Income Tax Accounting - Individual
ACC 440. Basic Income Tax - Business Entities and Gift/Estate Taxes

FULL-TIME MS IN ACCOUNTANCY (NON-INTERNSHIP TRACK)

FALL SEMESTER		SPRING SEMESTER	
FALL A	FALL B	SPRING A	SPRING B
*ACC 447 Reporting Analytics in Financial Markets (3 credits)	*ACC 417 Auditing (3 credits)	ACC 424 Financial Reporting II	*ACC 438 Accounting Information Systems (3 credits)
*ACC 410 Managerial Accounting and Performance Management	BPP 433 Business Law and Policy (3 credits)	ACC 446 Accounting/FinTech (3 credits)	
ACC 423 Financial Reporting I		*ACC 411 Applied Financial Statement Analysis with Data Analytics	Choose 1 Elective: *ACC 418 Taxes and Business Strategy *ACC 439 Accounting Analytics for Forensics
MGC 461 Professional Communication (4 credits)		*ACC 441 Gov/Nonprofit, Sustainable and Responsible Accounting	
		Optional courses for students needing additional US Tax courses	
		ACC 437 Basic Federal Income Tax Accounting - Individual	ACC 440 Basic Income Tax – Business Entities and Gift/Estate Taxes
Fall Total Credit Hours: 18		Spring Total Credit Hours: 16 (up to 21)	

FULL-TIME MS IN ACCOUNTANCY (INTERNSHIP TRACK)

<table>
<tr><th colspan="2">FALL SEMESTER</th><th colspan="2">SPRING SEMESTER</th><th rowspan="2">SUMMER TERM</th><th colspan="2">FALL SEMESTER</th></tr>
<tr><th>FALL A</th><th>FALL B</th><th>SPRING A</th><th>SPRING B</th><th>FALL A</th><th>FALL B</th></tr>
<tr><td>*ACC 447
Reporting Analytics in Financial Markets
(3 credits)</td><td>*ACC 417
Auditing
(3 credits)</td><td>ACC 424
Financial Reporting II</td><td>*ACC 438
Accounting Information Systems
(3 credits)</td><td rowspan="5">Internship</td><td colspan="2" rowspan="5">ACC 446
Accounting/ FinTech
(3 credits)</td></tr>
<tr><td>*ACC 410
Managerial Accounting and Performance Management</td><td>BPP 433
Business Law and Policy
(3 credits)</td><td>*ACC 411
Applied Financial Statement Analysis with Data Analytics</td><td rowspan="2">Choose 1 Elective:
*ACC 418
Taxes and Business Strategy

*ACC 439
Accounting Analytics for Forensics</td></tr>
<tr><td>ACC 423
Financial Reporting I</td><td></td><td>*ACC 441
Gov/Nonprofit, Sustainable and Responsible Accounting</td></tr>
<tr><td colspan="2" rowspan="2">MGC 461
Professional Communication
(4 credits)</td><td colspan="2">Optional courses for tudents needing additional US Tax courses</td></tr>
<tr><td>ACC 437
Basic Federal Income Tax Accounting - Individual</td><td>ACC 440
Basic Income Tax – Business Entities and Gift/ Estate Taxes</td></tr>
<tr><td colspan="2">Fall Total Credit Hours: 18</td><td colspan="2">Spring Total Credit Hours: 13 (up to 18)</td><td></td><td colspan="2">Fall Total Credit Hours: 3</td></tr>
</table>

All courses are 2.5 credits unless noted otherwise.

Degree Total Credit Hours: 34 (up to 39)

Key Elements for MSA Students

The program of study for the MSA degree has been designed as a lock-step program which meets all the requirements for a STEM certified program.

Substitutions

- Students with prior coursework that is equivalent to an MSA course may petition for a course substitution.
- Course subsititions are limited to 3 courses.
- Students must have earned a grade of B or better in the prior coursework in order to be eligible for a course substitution.
- Petitions must be submitted to your academic advisor by September 15th for the entire academic year.
- Petitions must include a course description and syllabus from the course they believe meets the requirements for a substitution.
- If a substitution is approved, a meeting will be scheduled with your academic advisor to determine an appropriate substitute course.
- Final approval is given by Professor Hungerford.

Internship Track

- MSA students in the Internship Track will not take ACC446 in the Spring but will take ACC446 the following Fall as their last class. There are no exceptions on this class.
- The last class of ACC446 can be taken in a hybrid format, but it is required that all students return during the last week of the semester for an in-person component of the hybrid class. Failure to attend the in-person component will result in failing the class. Details on the in-person requirements will be shared by the Academic Advising team.
- Requests to change tracks must be made to your academic advisor. The deadline to change tracks is December 13.

Teams

- Before classes start students in the MSA program will be pre-assigned to teams of 4 or 5 for your core classes.
- Requests to change teams within a semester will not be granted. It is expected you will learn to work with your team through any issues or obstacles that arise and utilize the advising process for issue resolution.
- Any team that has significant enough issues that they are unable to resolve them internally will be referred to the Office of Student Engagement for a peer evaluation. The results of which will be shared with the appropriate faculty members.

4 + 1 Program

- Students interested in the 4+1 program can take up to 7.5 credits of Simon graduate coursework during their final year of Undergraduate study.

FULL-TIME MASTER OF SCIENCE IN FINANCE

The program of study for the Master of Science in Finance is a lock-step program which meets all the requirements for a STEM-designated degree. Students take 12 core courses and 2 electives. A minimum 3.0 grade point average is required for graduation. STEM designated courses are indicated with an asterisk (*).

Students in the MS in Finance program can select a specific degree option for their program of study.

The options available are:

- Generalist
- Investment Management and Financial Analysis
- Corporate Finance and Strategy
- Fin Tech and Innovation

Common Core Courses

ACC 401.** Corporate Financial Accounting
*CIS 468. Financial Spreadsheet Modeling
*FIN 411. Financial Markets and Investments
*FIN 413. Corporate Finance and Capital Budgeting
*FIN 424. Financial Options and Strategic Flexibility
*FIN 462. Foundations in Financial Economics
*FIN 465. Applied Finance Project
*GBA 462P. Core Statistics for MS Students using Python
GBA 485A. Foundations of Python
MGC 461. Professional Communication

<table>
<tr><th>Generalist</th><th>Investment Management and Financial Analysis</th><th>Corporate Finance and Strategy</th><th>Fin Tech and Innovation</th></tr>
<tr><td rowspan="2"><u>Elective Options</u>
<u>Choose 4:</u>
*ACC 411.
Applied Financial Statement Analysis with Data Analytics
*BPP 426.
Macroeconomic Policy: Choices and Outcomes
*CIS 433.
AI and Deep Learning
*FIN 418.
Quantitative Investing
FIN 421.
Asset Management
*FIN 430.
Advanced Capital Budgeting and Strategic Financial Management
*FIN 438.
Mergers and Acquisitions
*FIN 439.
Corporate Restructuring
*FIN 443.
Private Equity
*FIN 446.
Financial Technology
*FIN 448.
Debt Markets and Fixed Income Strategies
*FIN 478.
Introduction to AI and Finance</td><td><u>Core Courses</u>
*FIN 418.
Quantitative Investing
*FIN 448.
Debt Markets and Fixed Income</td><td><u>Core Courses</u>
*FIN 430.
Advanced Capital Budgeting and Strategic Financial Management
*FIN 438.
Mergers and Acquisitions</td><td><u>Core Courses</u>
*FIN 446.
Financial Technology
*FIN 478.
Introduction to AI and Finance</td></tr>
<tr><td><u>Elective Options</u>
<u>Choose 2:</u>
*ACC 411.
Applied Financial Statement Analysis with Data Analytics
*BPP 426.
Macroeconomic Policy: Choices and Outcomes
FIN 421.
Asset Management</td><td><u>Elective Options</u>
<u>Choose 2:</u>
*ACC 411.
Applied Financial Statement Analysis with Data Analytics
*FIN 439.
Corporate Restructuring
*FIN 443.
Private Equity</td><td><u>Elective Options</u>
<u>Choose 2:</u>
*CIS 433.
AI and Deep Learning
*FIN 443.
Private Equity</td></tr>
</table>

FULL-TIME MS IN FINANCE: GENERALIST (NON-INTERNSHIP TRACK)

<table>
<tr><th colspan="2">FALL SEMESTER</th><th colspan="2">SPRING SEMESTER</th></tr>
<tr><th>FALL A</th><th>FALL B</th><th>SPRING A</th><th>SPRING B</th></tr>
<tr><td>*GBA 462P
Core Statistics for MS Students using Python</td><td>*FIN 411
Financial Markets and Investments</td><td colspan="2">*FIN 465
Applied Finance Project (By Topic)
(3 credits)</td></tr>
<tr><td>*FIN 462
Foundations in Financial Economics</td><td>*FIN 413
Corporate Finance and Capital Budgeting</td><td>*CIS 468
Financial Spreadsheet Modeling</td><td></td></tr>
<tr><td rowspan="2">ACC 401**
Corporate Financial Accounting</td><td rowspan="2">*FIN 424
Financial Options and Strategic Flexibility</td><td><u>Choose 2 Electives:</u></td><td><u>Choose 2 Electives:</u></td></tr>
<tr><td rowspan="3">*BPP 426
Macroeconomic Policy: Choices and Outcomes

*FIN 418
Quantitative Investing

FIN 421
Asset Management

*FIN 430
Advanced Capital Budgeting and Strategic Financial Management

*FIN 438
Mergers and Acquisitions

*FIN 446
Financial Technology

*FIN 478
Introduction to AI and Finance</td><td rowspan="3">*ACC 411
Applied Financial Statement Analysis with Data Analytics

*CIS 433
AI and Deep Learning

*FIN 439
Corporate Restructuring

*FIN 443
Private Equity

*FIN 448
Debt Markets and Fixed Income Strategies</td></tr>
<tr><td colspan="2">MGC 461
Professional Communication
(4 credits)</td></tr>
<tr><td>GBA 485A
Foundations of Python
(.5 credit)</td><td></td></tr>
<tr><td colspan="2">Fall Total Credit Hours: 19.5</td><td colspan="2">Spring Total Credit Hours: 15.5</td></tr>
</table>

FULL-TIME MS IN FINANCE: GENERALIST (INTERNSHIP TRACK)

<table>
<tr><th colspan="2">FALL SEMESTER</th><th colspan="2">SPRING SEMESTER</th><th rowspan="2">SUMMER TERM</th><th rowspan="2">FALL SEMESTER</th></tr>
<tr><th>FALL A</th><th>FALL B</th><th>SPRING A</th><th>SPRING B</th><th>FALL A FALL B</th></tr>
<tr><td>*GBA 462P
Core Statistics for MS Students using Python</td><td>*FIN 411
Financial Markets and Investments</td><td>*CIS 468
Financial Spreadsheet Modeling</td><td></td><td rowspan="6">Internship</td><td rowspan="6">*FIN 465
Applied Finance Project
(By Topic)
(3 credits)</td></tr>
<tr><td>*FIN 462
Foundations in Financial Economics</td><td>*FIN 413
Corporate Finance and Capital Budgeting</td><td><u>Choose 2 Electives:</u></td><td><u>Choose 2 Electives:</u></td></tr>
<tr><td>ACC 401**
Corporate Financial Accounting</td><td>*FIN 424
Options and Futures with Python</td><td rowspan="3">*BPP 426
Macroeconomic Policy: Choices and Outcomes

*FIN 418
Quantitative Investing

FIN 421
Asset Management

*FIN 430
Advanced Capital Budgeting and Strategic Financial Management

*FIN 438
Mergers and Acquisitions

*FIN 446
Financial Technology

*FIN 478
Introduction to AI and Finance</td><td rowspan="3">*ACC 411
Applied Financial Statement Analysis with Data Analytics

*CIS 433
AI and Deep Learning

*FIN 439
Corporate Restructuring

*FIN 443
Private Equity

*FIN 448
Debt Markets and Fixed Income Strategies</td></tr>
<tr><td colspan="2">MGC 461
Professional Communication
(4 credits)</td></tr>
<tr><td>GBA 485A
Foundations of Python
(.5 credit)</td><td></td></tr>
<tr><td colspan="2">Fall Total Credit Hours: 19.5</td><td colspan="2">Spring Total Credit Hours: 13</td><td></td><td>Fall Total Credit Hours: 2.5</td></tr>
</table>

**Students with sufficient prior coursework in accountancy can petition to substitute ACC401 (Corporate Financial Accounting) with ACC423 (Financial Reporting I).

*Students pursuing the Generalist option are expected to take 2 electives in Spring A and 2 electives in Spring B. Any exceptions to this must be approved by your academic advisor.

All courses are 2.5 credits unless noted otherwise.

Minimum Degree Total Credit Hours: 35

FULL-TIME MS IN FINANCE:
INVESTMENT MANAGEMENT AND FINANCIAL ANALYSIS (NON-INTERNSHIP TRACK)

<table>
<tr><th colspan="2">FALL SEMESTER</th><th colspan="2">SPRING SEMESTER</th></tr>
<tr><th>FALL A</th><th>FALL B</th><th>SPRING A</th><th>SPRING B</th></tr>
<tr><td>*GBA 462P
Core Statistics for MS Students using Python</td><td>*FIN 411
Financial Markets and Investments</td><td colspan="2">*FIN 465
Applied Finance Project (By Topic)
(3 credits)</td></tr>
<tr><td>*FIN 462
Foundations in Financial Economics</td><td>*FIN 413
Corporate Finance and Capital Budgeting</td><td>*CIS 468
Financial Spreadsheet Modeling</td><td></td></tr>
<tr><td>ACC 401**
Corporate Financial Accounting</td><td>*FIN 424
Financial Options and Strategic Flexibility</td><td>*FIN 418
Quantitative Investing</td><td>*FIN 448
Debt Markets and Fixed Income Strategies</td></tr>
<tr><td colspan="2" rowspan="2">MGC 461
Professional Communication
(4 credits)</td><td><u>Choose 1 Elective:</u></td><td><u>Choose 1 Elective:</u></td></tr>
<tr><td rowspan="2">*BPP 426
Macroeconomic Policy: Choices and Outcomes

FIN 421
Asset Management</td><td rowspan="2">*ACC 411
Applied Financial Statement Analysis with Data Analytics</td></tr>
<tr><td>GBA 485A
Foundations of Python
(.5 credit)</td><td></td></tr>
<tr><td colspan="2">Fall Total Credit Hours: 19.5</td><td colspan="2">Spring Total Credit Hours: 15.5</td></tr>
</table>

FULL-TIME MS IN FINANCE:
INVESTMENT MANAGEMENT AND FINANCIAL ANALYSIS (INTERNSHIP TRACK)

<table>
<tr><th colspan="2">FALL SEMESTER</th><th colspan="2">SPRING SEMESTER</th><th rowspan="2">SUMMER TERM</th><th rowspan="2">FALL SEMESTER</th></tr>
<tr><th>FALL A</th><th>FALL B</th><th>SPRING A</th><th>SPRING B</th><th>FALL A FALL B</th></tr>
<tr><td>*GBA 462P
Core Statistics for MS Students using Python</td><td>*FIN 411
Financial Markets and Investments</td><td>*CIS 468
Financial Spreadsheet Modeling</td><td></td><td rowspan="6">Internship</td><td rowspan="6">*FIN 465
Applied Finance Project
(By Topic)
(3 credits)</td></tr>
<tr><td>*FIN 462
Foundations in Financial Economics</td><td>*FIN 413
Corporate Finance and Capital Budgeting</td><td rowspan="2">*FIN 418
Quantitative Investing</td><td rowspan="2">*FIN 448
Debt Markets and Fixed Income Strategies</td></tr>
<tr><td>ACC 401**
Corporate Financial Accounting</td><td>*FIN 424
Financial Options and Strategic Flexibility</td></tr>
<tr><td colspan="2" rowspan="2">MGC 461
Professional Communication
(4 credits)</td><td><u>Choose 1 Elective:</u></td><td><u>Choose 1 Elective:</u></td></tr>
<tr><td rowspan="2">*BPP 426
Macroeconomic Policy: Choices and Outcomes

FIN 421
Asset Management</td><td rowspan="2">*ACC 411
Applied Financial Statement Analysis with Data Analytics</td></tr>
<tr><td>GBA 485A
Foundations of Python
(.5 credit)</td><td></td></tr>
<tr><td colspan="2">Fall Total Credit Hours: 19.5</td><td colspan="2">Spring Total Credit Hours: 13</td><td></td><td>Fall Total Credit Hours: 2.5</td></tr>
</table>

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All courses are 2.5 credits unless noted otherwise.

Minimum Degree Total Credit Hours: 35

FULL-TIME MS IN FINANCE:
CORPORATE FINANCE AND STRATEGY (NON-INTERNSHIP TRACK)

<table>
<tr><th colspan="2">FALL SEMESTER</th><th colspan="2">SPRING SEMESTER</th></tr>
<tr><th>FALL A</th><th>FALL B</th><th>SPRING A</th><th>SPRING B</th></tr>
<tr><td>*GBA 462P
Core Statistics for MS Students using Python</td><td>*FIN 411
Financial Markets and Investments</td><td colspan="2">*FIN 465
Applied Finance Project (By Topic)
(3 credits)</td></tr>
<tr><td>*FIN 462
Foundations in Financial Economics</td><td>*FIN 413
Corporate Finance and Capital Budgeting</td><td>*CIS 468
Financial Spreadsheet Modeling</td><td></td></tr>
<tr><td rowspan="2">ACC 401**
Corporate Financial Accounting</td><td rowspan="2">*FIN 424
Financial Options and Strategic Flexibility</td><td rowspan="2">*FIN 430
Advanced Capital Budgeting and Strategic Financial Management</td><td><u>Choose 2 Electives:</u></td></tr>
<tr><td rowspan="3">*ACC 411
Applied Financial Statement Analysis with Data Analytics

*FIN 439
Corporate Restructuring

*FIN 443
Private Equity</td></tr>
<tr><td colspan="2">MGC 461
Professional Communication
(4 credits)</td><td rowspan="2">*FIN 438
Mergers and Acquisitions</td></tr>
<tr><td>GBA 485A
Foundations of Python
(.5 credit)</td><td></td></tr>
<tr><td colspan="2">Fall Total Credit Hours: 19.5</td><td colspan="2">Spring Total Credit Hours: 15.5</td></tr>
</table>

FULL-TIME MS IN FINANCE:
CORPORATE FINANCE AND STRATEGY (INTERNSHIP TRACK)

<table>
<tr><th colspan="2">FALL SEMESTER</th><th colspan="2">SPRING SEMESTER</th><th rowspan="2">SUMMER TERM</th><th rowspan="2">FALL SEMESTER</th></tr>
<tr><th>FALL A</th><th>FALL B</th><th>SPRING A</th><th>SPRING B</th><th>FALL A FALL B</th></tr>
<tr><td>*GBA 462P
Core Statistics for MS Students using Python</td><td>*FIN 411
Financial Markets and Investments</td><td>*CIS 468
Financial Spreadsheet Modeling</td><td></td><td rowspan="5">Internship</td><td rowspan="5">*FIN 465
Applied Finance Project
(By Topic)
(3 credits)</td></tr>
<tr><td>*FIN 462
Foundations in Financial Economics</td><td>*FIN 413
Corporate Finance and Capital Budgeting</td><td rowspan="2">*FIN 430
Advanced Capital Budgeting and Strategic Financial Management</td><td><u>Choose 2 Electives:</u></td></tr>
<tr><td>ACC 401**
Corporate Financial Accounting</td><td>*FIN 424
Financial Options and Strategic Flexibility</td><td rowspan="3">*ACC 411
Applied Financial Statement Analysis with Data Analytics

*FIN 439
Corporate Restructuring

*FIN 443
Private Equity</td></tr>
<tr><td colspan="2">MGC 461
Professional Communication
(4 credits)</td><td rowspan="2">*FIN 438
Mergers and Acquisitions</td></tr>
<tr><td>GBA 485A
Foundations of Python
(.5 credit)</td><td></td></tr>
<tr><td colspan="2">Fall Total Credit Hours: 19.5</td><td colspan="2">Spring Total Credit Hours: 13</td><td></td><td>Fall Total Credit Hours: 2.5</td></tr>
</table>

**Students with sufficient prior coursework in accountancy can petition to substitute ACC401 (Corporate Financial Accounting) with ACC423 (Financial Reporting I).

All courses are 2.5 credits unless noted otherwise.

Minimum Degree Total Credit Hours: 35

FULL-TIME MS IN FINANCE:
FIN TECH AND INNOVATION (NON-INTERNSHIP TRACK)

<table>
<tr><th colspan="2">FALL SEMESTER</th><th colspan="2">SPRING SEMESTER</th></tr>
<tr><th>FALL A</th><th>FALL B</th><th>SPRING A</th><th>SPRING B</th></tr>
<tr><td>*GBA 462P
Core Statistics for MS Students using Python</td><td>*FIN 411
Financial Markets and Investments</td><td colspan="2">*FIN 465
Applied Finance Project (By Topic)
(3 credits)</td></tr>
<tr><td>*FIN 462
Foundations in Financial Economics</td><td>*FIN 413
Corporate Finance and Capital Budgeting</td><td>*CIS 468
Financial Spreadsheet Modeling</td><td></td></tr>
<tr><td rowspan="2">ACC 401**
Corporate Financial Accounting</td><td rowspan="2">*FIN 424
Financial Options and Strategic Flexibility</td><td rowspan="2">*FIN 446
Financial Technology</td><td><u>Choose 2 Electives:</u></td></tr>
<tr><td rowspan="3">*CIS 433
AI and Deep Learning

*FIN 443
Private Equity</td></tr>
<tr><td colspan="2">MGC 461
Professional Communication
(4 credits)</td><td rowspan="2">*FIN 478
Introduction to AI and Finance</td></tr>
<tr><td>GBA 485A
Foundations of Python
(.5 credit)</td><td></td></tr>
<tr><td colspan="2">Fall Total Credit Hours: 19.5</td><td colspan="2">Spring Total Credit Hours: 15.5</td></tr>
</table>

FULL-TIME MS IN FINANCE:
FIN TECH AND INNOVATION (INTERNSHIP TRACK)

<table>
<tr><th colspan="2">FALL SEMESTER</th><th colspan="2">SPRING SEMESTER</th><th rowspan="2">SUMMER TERM</th><th rowspan="2">FALL SEMESTER</th></tr>
<tr><th>FALL A</th><th>FALL B</th><th>SPRING A</th><th>SPRING B</th><th>FALL A FALL B</th></tr>
<tr><td>*GBA 462P
Core Statistics for MS Students using Python</td><td>*FIN 411
Financial Markets and Investments</td><td>*CIS 468
Financial Spreadsheet Modeling</td><td></td><td rowspan="6">Internship</td><td rowspan="6">*FIN 465
Applied Finance Project
(By Topic)
(3 credits)</td></tr>
<tr><td>*FIN 462
Foundations in Financial Economics</td><td>*FIN 413
Corporate Finance and Capital Budgeting</td><td rowspan="2">*FIN 446
Financial Technology</td><td><u>Choose 2 Electives:</u></td></tr>
<tr><td>ACC 401**
Corporate Financial Accounting</td><td>*FIN 424
Options and Futures with Python</td><td rowspan="3">*CIS 433
AI and Deep Learning

*FIN 443
Private Equity</td></tr>
<tr><td colspan="2">MGC 461
Professional Communication
(4 credits)</td><td rowspan="2">*FIN 478
Introduction to AI and Finance</td></tr>
<tr><td>GBA 485A
Foundations of Python
(.5 credit)</td><td></td></tr>
<tr><td colspan="2">Fall Total Credit Hours: 19.5</td><td colspan="2">Spring Total Credit Hours: 13</td><td></td><td>Fall Total Credit Hours: 2.5</td></tr>
</table>

**Students with sufficient prior coursework in accountancy can petition to substitute ACC401 (Corporate Financial Accounting) with ACC423 (Financial Reporting I).

All courses are 2.5 credits unless noted otherwise.

Minimum Degree Total Credit Hours: 35

Key Elements for MSF Students

The program of study for the MSF degree has been designed as a lock-step program which meets all the requirements for a STEM certified program.

Substitutions

- Students with sufficient prior coursework in Accountancy, or holding a CPA can petition to substitute ACC401 (Corporate Financial Acct) with ACC423 (Financial Reporting I) in Fall A. Petitions must be submitted to your academic advisor by August 16.
- Students who graduated from the University of Rochester with an undergraduate business degree and have taken classes in the MSF core can petition to substitute those classes. Students should talk to their academic advisor if they have questions. This only pertains to University of Rochester students.

Internship Track

- MSF students in the internship track will not take CIS468 in the Spring but will take CIS468 the following Fall as their last class. There are no exceptions on this class.
- The last class of CIS468 can be taken in a hybrid format, but it is required that all students return during the last week of the semester for an in-person component of the hybrid class. Failure to attend the in-person component will result in failing the class. Details on the in-person requirements will be shared by the Academic Advising team.
- Requests to change tracks must be made to your academic advisor. The deadline to change tracks is December 13.

Teams

- Before classes start students in the MSF program will be pre-assigned to teams of 4 or 5 for your core classes.
- Requests to change teams within a semester will not be granted. It is expected you will learn to work with your team through any issues or obstacles that arise and utilize the advising process for issue resolution.
- Any team that has significant enough issues that they are unable to resolve them internally will be referred to the Office of Student Engagement for a peer evaluation. The results of which will be shared with the appropriate faculty members.

4 + 1 Program

- Students interested in the 4+1 program can take up to 7.5 credits of Simon graduate coursework during their final year of Undergraduate study.

FULL-TIME MASTER OF SCIENCE IN MARKETING ANALYTICS

The program of study for the Master of Science in Marketing Analytics is a lock-step program which meets all the requirements for a STEM-designated degree. It is designed to equip students with the skills and experience necessary to excel in marketing jobs in a compact, highly focused program. Students are likely to take a job related to one of the program's four main emphases: marketing research, consumer insights, pricing and digital marketing.

Students take 9 core courses and 4 electives. A minimum 3.0 grade point average is required for graduation. STEM designated courses are indicated with an asterisk (*)

CORE COURSES

*CIS467. Data Management and Warehousing
*GBA424. Analytics Design and Applications
*GBA 436R. Predictive and Causal Analytics in R
*GBA 462P. Core Statistics for MS Students using Python
GBA 463. Economics and Marketing Strategy for MS Students
*GBA 464. Programming for Analytics
MGC 461. Professional Communication
*MKT 414. Pricing Policies
*MKT 465. Marketing Analytics Project

ELECTIVE OPTIONS

*CIS432. Machine Learning for Business Analytics
*CIS 433. AI and Deep Learning
*CIS 434. Social Media and Text Analytics
*GBA 468P. Prescriptive Analytics with Python
*GBA 478. Introduction to AI and Business
MKT 413. Applied Product Management
MKT 431. Consumer Behavior
*MKT 437. Digital Marketing Strategy
MKT 438. B2B Pricing
*MKT 439. Advanced Pricing
*MKT 440. Pricing Analytics
*MKT 451. Consumer and Brand Research
*OMG 416. Project Management

FULL-TIME MS IN MARKETING ANALYTICS (NON-INTERNSHIP TRACK)

<table>
<tr><th colspan="2">FALL SEMESTER</th><th colspan="2">SPRING SEMESTER</th></tr>
<tr><th>FALL A</th><th>FALL B</th><th>SPRING A</th><th>SPRING B</th></tr>
<tr><td colspan="2">MGC 461
Professional Communication
(4 credits)</td><td colspan="2">*MKT 465
Marketing Analytics Project
(3 credits)</td></tr>
<tr><td>*GBA 464
Programming for Analytics</td><td>*GBA 424
Analytics Design and Applications</td><td>*CIS 467
Data Management and Warehousing</td><td></td></tr>
<tr><td>*GBA 462P
Core Statistics for MS Students Using Python</td><td>*GBA 436R
Predictive and Causal Analytics in R</td><td colspan="2"><u>Choose at least 4 Electives:</u></td></tr>
<tr><td>GBA 463
Economics and Marketing Strategy for MS Students</td><td>*MKT 414
Pricing Policies</td><td rowspan="2">*CIS 432
Machine Learning for Business Analytics

*GBA468P
Prescriptive Analytics with Python

MKT 413
Applied Product Management

*MKT 437
Digital Marketing Strategy

MKT 438
B2B Pricing</td><td rowspan="2">*CIS 433
AI and Deep Learning

*CIS 434
Social Media and Text Analytics

*GBA 478
Introduction to AI and Business

MKT 431
Consumer Behavior

*MKT 439
Advanced Pricing

*MKT 440
Pricing Analytics

*MKT 451
Consumer and Brand Research

*OMG 416
Project Management</td></tr>
<tr><td colspan="2"></td></tr>
<tr><td colspan="2">Fall Total Credit Hours: 19</td><td colspan="2">Spring Total Credit Hours: 15.5</td></tr>
</table>

FULL-TIME MS IN MARKETING ANALYTICS (INTERNSHIP TRACK)

<table>
<tr><th colspan="2">FALL SEMESTER</th><th colspan="2">SPRING SEMESTER</th><th rowspan="2">SUMMER TERM</th><th colspan="2">FALL SEMESTER</th></tr>
<tr><th>FALL A</th><th>FALL B</th><th>SPRING A</th><th></th><th>FALL A</th><th>FALL B</th></tr>
<tr><td colspan="2">MGC 461
Professional Communication
(4 credits)</td><td rowspan="2">*CIS 467
Data Management and Warehousing</td><td rowspan="2"></td><td rowspan="5">Internship</td><td colspan="2" rowspan="5">*MKT 465
Marketing Analytics Project
(3 credits)</td></tr>
<tr><td>*GBA 464
Programming for Analytics</td><td>*GBA 424
Analytics Design and Applications</td></tr>
<tr><td>*GBA 462P
Core Statistics for MS Students Using Python</td><td>*GBA 436R
Predictive and Causal Analytics in R</td><td colspan="2">Choose at least 4 Electives:</td></tr>
<tr><td>GBA 463
Economics and Marketing Strategy for MS Students</td><td>*MKT 414
Pricing Policies</td><td>*CIS 432
Machine Learning for Business Analytics

*GBA468P
Prescriptive Analytics with Python

MKT 413
Applied Product Management

*MKT 437
Digital Marketing Strategy

MKT 438
B2B Pricing</td><td>*CIS 433
AI and Deep Learning

*CIS 434
Social Media and Text Analytics

*GBA 478
Introduction to AI and Business

MKT 431
Consumer Behavior

*MKT 439
Advanced Pricing

*MKT 440
Pricing Analytics

*MKT 451
Consumer and Brand Research

*OMG 416
Project Management</td></tr>
<tr><td colspan="2">Fall Total Credit Hours: 19</td><td colspan="2">Spring Total Credit Hours: 12.5</td><td></td><td colspan="2">Fall Total Credit Hours: 3</td></tr>
</table>

All courses are 2.5 credits unless noted otherwise.

Minimum Degree Total Credit Hours: 34.5

Key Elements for MSMA Students

The program of study for the MSMA degree is a lock-step program that meets all the requirements for a STEM certified program.

Internship Track

- MSMA students in the Internship track will not take MKT465 in the Spring but will take MKT465 the following Fall as their last class. There are no exceptions on this class.
- The last class of MKT465 can be taken in hybrid format, but it is required that all students return during the last week of the semester for an in-person component of the hybrid class. Failure to attend the in-person component will result in failing the class. Details on the in-person requirements will be shared by the Academic Advising team.
- Requests to change tracks must be made to your academic advisor. The deadline to change tracks is December 13.

Teams

- Before classes start students in the MSMA program will be pre-assigned to teams of 4 or 5 for your core classes.
- Requests to change teams within a semester will not be granted. It is expected you will learn to work with your team through any issues or obstacles that arise and utilize the advising process for issue resolution.
- Any team that has significant enough issues that they are unable to resolve them internally will be referred to the Office of Student Engagement for a peer evaluation. The results of which will be shared with the appropriate faculty members.

4 + 1 Program

- Students interested in the 4+1 program can take up to 7.5 credits of Simon graduate coursework during their final year of Undergraduate study.

FULL-TIME MASTER OF SCIENCE IN BUSINESS ANALYTICS

The program of study for the Master of Science in Business Analytics degree has been designated as a lock-step program which meets all the requirements for a STEM designated program. It combines business frameworks with the latest data analytics techniques to provide students with skills and concepts to deal with big data in organizations. Students will learn concepts for dealing with large volumes, real time and unstructured data from organizational, web, and social sources. Economics, statistics, and elements from computer science form the foundation of the program.

Students take 10 core courses and 3 electives. A minimum 3.0 grade point average is required for graduation. STEM designated courses are indicated with an asterisk (*)

CORE COURSES

*CIS 434. Social Media and Text Analytics
*CIS 465. Business Analytics Project
*CIS 467. Data Management and Warehousing
*GBA 424. Analytics Design and Applications
*GBA 436R. Predictive and Causal Analytics in R
*GBA 462P. Core Statistics for MS Students using Python
GBA 463. Economics and Marketing Strategy for MS Students
*GBA 464. Programming for Analytics
*GBA 468P. Prescriptive Analytics with Python
MGC 461. Professional Communication

ELECTIVE OPTIONS

*CIS 431. Big Data
*CIS 432. Machine Learning for Business Analytics
*CIS 433. AI and Deep Learning
*FIN 430. Advanced Capital Budgeting and Strategic Financial Management
*FIN 478. Introduction to AI and Finance
*GBA478. Introduction to AI and Business
*GBA479. Generative AI and Business Applications
MKT 413. Applied Product Management
*MKT414. Pricing Policies
MKT 438. B2B Pricing
*MKT439. Advanced Pricing
*MKT440. Pricing Analytics
*OMG402. Operations Management
*OMG411. Supply Chain Analytics
*OMG416. Project Management

FULL-TIME MS IN BUSINESS ANALYTICS (NON-INTERNSHIP TRACK)

FALL SEMESTER		SPRING SEMESTER	
FALL A	FALL B	SPRING A	SPRING B
MGC 461 Professional Communication (4 credits)		*GBA468P Prescriptive Analytics with Python	*CIS 434 Social Media and Text Analytics
*GBA 464 Programming for Analytics	*GBA 424 Analytics Design and Applications	*CIS 467 Data Management and Warehousing	
*GBA 462P Core Statistics for MS Students Using Python	*GBA 436R Predictive and Causal Analytics in R	*CIS 465 Business Analytics Project (3 credits)	
GBA 463 Economics and Marketing Strategy for MS Students	Choose 1 Elective:	Choose at least 2 Electives:	
	*GBA 478 Introduction to AI and Business *MKT 414 Pricing Policies *OMG 402 Operations Management	*CIS 432 Machine Learning for Business Analytics *FIN 430 Advanced Capital Budgeting and Strategic Financial Management *FIN 478 Introduction to AI and Finance *GBA 479 Generative AI and Business Applications MKT 413 Applied Product Management MKT 438 B2B Pricing *OMG 411 Supply Chain Analytics	*CIS 431 Big Data *CIS 433 AI and Deep Learning *MKT 439 Advanced Pricing *MKT 440 Pricing Analytics *OMG 416 Project Management
Fall Total Credit Hours: 19		Spring Total Credit Hours: 15.5	

FULL-TIME MS IN BUSINESS ANALYTICS (INTERNSHIP TRACK)

FALL SEMESTER		SPRING SEMESTER		SUMMER TERM	FALL SEMESTER	
FALL A	FALL B	SPRING A	SPRING B		FALL A	FALL B
MGC 461 Professional Communication (4 credits)		*GBA468P Prescriptive Analytics with Python	*CIS 434 Social Media and Text Analytics	Internship	*CIS 465 Business Analytics Project (3 credits)	
*GBA 464 Programming for Analytics	*GBA 424 Analytics Design and Applications	*CIS 467 Data Management and Warehousing				
*GBA 462P Core Statistics for MS Students Using Python	*GBA 436R Predictive and Causal Analytics in R					
GBA 463 Economics and Marketing Strategy for MS Students	Choose 1 Elective:	Choose at least 2 electives:				
	*GBA 478 Introduction to AI and Business *MKT 414 Pricing Policies *OMG 402 Operations Management	*CIS 432 Machine Learning for Business Analytics *FIN 430 Advanced Capital Budgeting and Strategic Financial Management *FIN 478 Introduction to AI and Finance *GBA 479 Generative AI and Business Applications MKT 413 Applied Product Management MKT 438 B2B Pricing *OMG 411 Supply Chain Analytics	*CIS 431 Big Data *CIS 433 AI and Deep Learning *MKT 439 Advanced Pricing *MKT 440 Pricing Analytics *OMG 416 Project Management			
Fall Total Credit Hours: 19		Spring Total Credit Hours: 12.5			Fall Total Credit Hours: 3	

All courses are 2.5 credits unless noted otherwise.

Minimum Degree Total Credit Hours: 34.5

Key Elements for MSBA Students

The program of study for the MSBA degree has been designed as a lock-step program which meets all the requirements for a STEM certified program.

Internship Track

- MSBA students in the internship track will not take CIS465 in the Spring but will take CIS465 the following Fall as their last class. There are no exceptions on this class.
- The last class of CIS465 can be taken in hybrid format, but it is required that all students return during the last week of the semester for an in-person component of the hybrid class. Failure to attend the in-person component will result in failing the class. Details on the in-person requirements will be shared by the Academic Advising team.
- Requests to change tracks must be made to your academic advisor. The deadline to change tracks is December 13.

Teams

- Before classes start students in the MSBA program will be pre-assigned to teams of 4 or 5 for your core classes.
- Requests to change teams within a semester will not be granted. It is expected you will learn to work with your team through any issues or obstacles that arise and utilize the advising process for issue resolution.
- Any team that has significant enough issues that they are unable to resolve them internally will be referred to the Office of Student Engagement for a peer evaluation. The results of which will be shared with the appropriate faculty members.

4 + 1 Program

- Students interested in the 4+1 program can take up to 7.5 credits of Simon graduate coursework during their final year of Undergraduate study.

FULL-TIME MASTER OF SCIENCE IN AI IN BUSINESS

Simon's one-year MS program in AI in Business is positioned to give students a technical competence in AI, as well as an overall business acumen with AI at the forefront, enabling students to use the most innovative tools for value creation. With rapid advancements in generative AI reshaping industries, it is increasingly important for students to have a significant understanding of AI, and to be equipped with the most relevant and cutting-edge skills, to succeed in today's dynamic business landscape.

The program has a significant STEM component, with course offerings focused on technology, statistics, and mathematics. An AI-focused business analytics project brings together the program's conceptual frameworks, analytical methodologies, and technical skills; students apply their knowledge and skills to a real-life project for a corporate sponsor organization.

Students take 8 core courses and 3 electives. A minimum 3.0 grade point average is required for graduation. STEM designated courses are indicated with an asterisk (*)

CORE COURSES

*CIS 433. AI and Deep Learning
*CIS 455. AI Business Project
*GBA 424. Analytics Design and Applications
*GBA 462P. Core Statistics for MS Students Using Python
*GBA 464. Programming for Analytics
*GBA 478. Introduction to AI and Business
*GBA 479. Generative AI and Business Applications
MGC 461. Professional Communication

ELECTIVE OPTIONS

*CIS 431. Big Data
*CIS 432. Machine Learning for Business Analytics
*CIS 434. Social Media and Text Analytics
*CIS 438. Agentic AI Application
*CIS467. Data Management and Warehousing
*GBA 436R. Predictive and Causal Analytics in R
*GBA 468P. Prescriptive Analytics with Python

FULL-TIME MS IN AI IN BUSINESS (NON-INTERNSHIP TRACK)

<table>
<tr><th colspan="2">FALL SEMESTER</th><th colspan="2">SPRING SEMESTER</th></tr>
<tr><th>FALL A</th><th>FALL B</th><th>SPRING A</th><th>SPRING B</th></tr>
<tr><td colspan="2">MGC 461
Professional Communication
(4 credits)</td><td colspan="2">*CIS 455
AI Business Project
(3 credits)</td></tr>
<tr><td>*GBA 462P
Core Statistics for MS Students Using Python</td><td>*GBA 424
Analytics Design and Applications</td><td>*GBA 479
Generative AI and Business Applications</td><td>*CIS 433
AI and Deep Learning</td></tr>
<tr><td rowspan="2">*GBA 464
Programming for Analytics</td><td><u>Choose 1 Elective</u></td><td colspan="2"><u>Choose 3 Electives:</u></td></tr>
<tr><td rowspan="2">*GBA 436R
Predictive and Causal Analytics in R</td><td rowspan="2">*CIS 432
Machine Learning for Business Analytics

*CIS 467
Data Management and Warehousing

*GBA468P
Prescriptive Analytics with Python</td><td rowspan="2">*CIS 431
Big Data

*CIS 434
Social Media and Text Analytics

*CIS 438
Agentic AI Application</td></tr>
<tr><td>*GBA 478
Introduction to AI and Business</td></tr>
<tr><td colspan="2">Fall Total Credit Hours: 16.5</td><td colspan="2">Spring Total Credit Hours: 15.5</td></tr>
</table>

FULL-TIME MS IN AI IN BUSINESS (INTERNSHIP TRACK)

<table>
<tr><th colspan="2">FALL SEMESTER</th><th colspan="2">SPRING SEMESTER</th><th rowspan="2">SUMMER TERM</th><th colspan="2">FALL SEMESTER</th></tr>
<tr><th>FALL A</th><th>FALL B</th><th>SPRING A</th><th>SPRING B</th><th>FALL A</th><th>FALL B</th></tr>
<tr><td colspan="2">MGC 461
Professional Communication
(4 credits)</td><td>*GBA 479
Generative AI and Business Applications</td><td>*CIS 433
AI and Deep Learning</td><td rowspan="5">Internship</td><td colspan="2" rowspan="5">*CIS 455
AI Business Project
(3 credits)</td></tr>
<tr><td>*GBA 462P
Core Statistics for MS Students Using Python</td><td>*GBA 424
Analytics Design and Applications</td><td colspan="2"></td></tr>
<tr><td rowspan="2">*GBA 464
Programming for Analytics</td><td><u>Choose 1 Elective</u></td><td colspan="2"><u>Choose 3 Electives:</u></td></tr>
<tr><td rowspan="2">*GBA 436R
Predictive and Causal Analytics in R</td><td rowspan="2">*CIS 432
Machine Learning for Business Analytics

*CIS 467
Data Management and Warehousing

*GBA468P
Prescriptive Analytics with Python</td><td rowspan="2">*CIS 431
Big Data

*CIS 434
Social Media and Text Analytics

*CIS 438
Agentic AI Application</td></tr>
<tr><td>*GBA 478
Introduction to AI and Business</td></tr>
<tr><td colspan="2">Fall Total Credit Hours: 16.5</td><td colspan="2">Spring Total Credit Hours: 12.5</td><td></td><td colspan="2">Fall Total Credit Hours: 3</td></tr>
</table>

All courses are 2.5 credits unless noted otherwise.

Minimum Degree Total Credit Hours: 32

CERTIFICATE PROGRAMS

CERTIFICATE OF ADVANCED ACHIEVEMENT IN AI

Open to Full-Time MSBA Students (Internship and Non-Internship Track)

This Certificate of Advanced Achievement represents a technical competence in AI for business students. To earn it, a MS Business Analytics student must complete 7.5 credits. Students are required to take both of the following two courses:

- GBA479 Generative AI and Business Applications (2.5 credits)
- CIS433 AI and Deep Learning (2.5 credits)

Students also choose an additional course, from the set of two courses below:
- GBA478 Introduction to AI and Business (2.5 credits)
- FIN478 Introduction to AI and Finance (2.5 credits)

Benefits
- Receive a Certificate of Advanced Achievement in AI
- Class credits count toward certificate and degree
- Optional benefit with no additional cost or time to complete*
- Maintains STEM designation
- Signals expertise and career focus to corporate recruiters

*Students can only count credits from a master's degree toward one certificate of advanced achievement. More than one certificate of advanced achievement during a master's degree requires additional credits; accordingly, the student may incur additional costs.

Find out more about AI at Simon here:
https://simon.rochester.edu/generative-ai-simon

CERTIFICATE OF ADVANCED ACHIEVEMENT IN PRICING

Open to Full-Time MSBA and MSMA Students (Internship and Non-Internship Track)

This certificate not only signifies a high level of pricing competency for MS Business Analytics and Marketing Analytics students but also reinforces the focus on pricing within their educational journey. This Certificate of Advanced Achievement represents a technical competence in pricing for business students. To earn it, a MS Business Analytics or Marketing Analytics student must complete 7.5 credits. Students are required to take the following course:

- MKT414 Pricing Policies (2.5 credits)

Students also choose two of the following courses (each worth 2.5 credits):
- MKT440 Pricing Analytics (2.5 credits)
- MKT438 B2B Pricing (2.5 credits)
- MKT439 Advanced Pricing (2.5 credits)

Benefits
- Receive a Certificate of Advanced Achievement in Pricing
- Class credits count toward certificate and degree
- Optional benefit with no additional cost or time to complete*
- Maintains STEM designation
- Signals expertise and career focus to corporate recruiters

*Students can only count credits from a master's degree toward one certificate of advanced achievement. More than one certificate of advanced achievement during a master's degree requires additional credits; accordingly, the student may incur additional costs.

CERTIFICATE OF ADVANCED ACHIEVEMENT IN CUSTOMER AND CAMPAIGN ANALYTICS

Open to Full-Time MSMA Students (Internship and Non-Internship Track)

This Certificate of Advanced Achievement represents a competence in managing products/projects to serve customer needs/ campaign objectives and measuring/analyzing customer interactions/campaign outcomes. To earn it, a Marketing Analytics student must complete 7.5 credits.

Students choose 3 of the courses below:

- MKT413 Applied Product Management (2.5 credits)
- MKT437 Digital Marketing Strategy (2.5 credits)
- MKT431 Consumer Behavior (2.5 credits)
- MKT451 Consumer and Brand Research (2.5 credits)
- OMG416 Project Management (2.5 credits)

Benefits

- Receive a Certificate of Advanced Achievement in Customer and Campaign Analytics
- Class credits count toward certificate and degree
- Optional benefit with no additional cost or time to complete*
- Maintains STEM designation
- Signals expertise and career focus to corporate recruiters

*Students can only count credits from a master's degree toward one certificate of advanced achievement. More than one certificate of advanced achievement during a master's degree requires additional credits; accordingly, the student may incur additional costs.

CERTIFICATE OF ADVANCED ACHIEVEMENT IN ANALYTICS

Open to Full-Time MSAIB Students (Internship and Non-Internship Track)

This Certificate of Advanced Achievement represents a competence in analytics for MS AI in Business students. To earn it, a MS AI in Business student must complete 7.5 credits. Students are required to take both of the following two courses:

- GBA436 Causal and Predictive Analytics (2.5 credits)
- CIS434 Social Medica and Text Analytics (2.5 credits)

Students also choose an additional course, from the set of two courses below:

- CIS432 Machine Learning for Business Analytics (2.5 credits)
- GBA468 Prescriptive Analytics (2.5 credits)

Benefits

- Receive a Certificate of Advanced Achievement in Analytics
- Class credits count toward certificate and degree
- Optional benefit with no additional cost or time to complete*
- Maintains STEM designation
- Signals expertise and career focus to corporate recruiters

*Students can only count credits from a master's degree toward one certificate of advanced achievement. More than one certificate of advanced achievement during a master's degree requires additional credits; accordingly, the student may incur additional costs.

CERTIFICATE OF ADVANCED ACHIEVEMENT IN SYSTEMS AND DATA ARCHITECTURES

Open to Full-Time MSAIB Students (Internship and Non-Internship Track)

This Certificate of Advanced Achievement represents a competence in data systems and management. To earn it, a MS AI in Business student must complete 7.5 credits. Students are required to take the following courses:

- CIS438 Agentic AI Application (2.5 credits)
- CIS467 Data Management and Warehousing (2.5 credits)
- CIS431 Big Data (2.5 credits)

Benefits

- Receive a Certificate of Advanced Achievement in Systems and Data Architectures
- Class credits count toward certificate and degree
- Optional benefit with no additional cost or time to complete*
- Maintains STEM designation
- Signals expertise and career focus to corporate recruiters

*Students can only count credits from a master's degree toward one certificate of advanced achievement. More than one certificate of advanced achievement during a master's degree requires additional credits; accordingly, the student may incur additional costs.

CERTIFICATE OF ADVANCED ACHIEVEMENT IN FORENSIC ACCOUNTING AND FRAUD EXAMINATION

Open to Full-Time MS Accounting Students (Internship and Non-Internship Track)

This Certificate of Advanced Achievement provides a competence in Forensic Accounting and Fraud Examination. To earn it, a MS Accounting student must complete 10.5 credits. Students are required to take the following courses:

- ACC439 Accounting Analytis for Forensics (2.5 credits)
- ACC417 Auditing (2.5 credits)
- ACC438 Accounting Information Systems (3 credits)
- BPP433 Business Law and Policy (3 credits)

Benefits

- Receive a Certificate of Advanced Achievement in Forensic Accounting and Fraud Examination
- Class credits count toward certificate and degree
- Optional benefit with no additional cost or time to complete*
- Maintains STEM designation
- Signals expertise and career focus to corporate recruiters

*Students can only count credits from a master's degree toward one certificate of advanced achievement. More than one certificate of advanced achievement during a master's degree requires additional credits; accordingly, the student may incur additional costs.

CERTIFICATE OF ADVANCED ACHIEVEMENT IN TAX

Open to Full-Time MS Accounting Students (Internship and Non-Internship Track)

This Certificate of Advanced Achievement provides a competence in US Taxation and Regulation Accounting and Strategy. To earn it, a MS Accounting student must complete 7.5 credits. Students are required to take the following courses:

- ACC418 Taxes and Business Strategy (2.5 credits)
- ACC437 Basic Federal Income Tax Accounting - Individual (2.5 credits)
- ACC440 Basic Income Tax-Business Entities and Gift/Estate Taxes (2.5 credits)

Benefits

- Receive a Certificate of Advanced Achievement in Tax
- Class credits count toward certificate and degree
- Optional benefit with no additional cost or time to complete*
- Maintains STEM designation
- Signals expertise and career focus to corporate recruiters

*Students can only count credits from a master's degree toward one certificate of advanced achievement. More than one certificate of advanced achievement during a master's degree requires additional credits; accordingly, the student may incur additional costs.

ADVANCED CERTIFICATES IN HEALTH CARE MANAGEMENT

The health care landscape is evolving rapidly, demanding strong business and management skills from both clinical and non-clinical professionals. Simon's Advanced Certificates in Health Care Management provide a focused way to build expertise in Leadership, Finance, Strategy and Marketing, or Analytics and AI. Each certificate program includes three graduate-level 7-week courses thoughtfully curated from Simon's Master of Science in Medical Management (MMM) program. Credits earned in up to two certificates may be applied toward completion of the 18-month part-time MMM degree program, providing the opportunity to stack credentials along your educational journey.

Program Webpage: https://simon.rochester.edu/graduate-certificates-health-care-management

Each certificate consists of three courses (7.5 credits). Students either take two courses per mini term, or a single course, depending on the certificate schedule; and complete the certificate in either two or three 7-week mini terms. Currently Advanced Certificates are offered in Health Care Finance, Health Care Leadership, Health Care Strategy and Marketing, and Health Care Analytics and Artificial Intelligence.

Health Care Finance

The Health Care Finance Advanced Certificate equips professionals with essential financial analysis and accounting skills to navigate the business side of health care.

Curriculum:

HSM420 Business Economics of the Health Care Industry

HSM425 Managerial Accounting for Health Care Organizations

HSM452 Health Care Accounting and Finance

Students enrolled in the Finance Advanced Certificate will be required to complete an economics workshop and Excel training.

Health Care Leadership

The Health Care Leadership Advanced Certificate equips professionals with the skills to navigate complex leadership challenges in health care.

Curriculum:

HSM 420 Business Economics of the Health Care Industry

HSM 454 Leading Health Care Organizations

Select one of the following:

GBA 435* Negotiation Theory and Practice: Bargaining for Value or STR 424: Human Resource Strategy

STR 403* Organization and Strategy

Students enrolled in the Leadership Advanced Certificate will be required to complete an economics workshop as part of their orientation.

Health Care Strategy and Marketing

The Health Care Strategy and Marketing Advanced Certificate equips professionals with essential skills in strategic analysis, business planning, and marketing for the health care industry.

Curriculum:

HSM420: Business Economics of the Health Care Industry

HSM451: Health Care Marketing and Business Plan Development

HSM430: Health Sciences Management and Strategy

Students enrolled in the Strategy and Marketing Advanced Certificate will need to complete an economics workshop.

Health Care Analytics and Artificial Intelligence

The Health Care Analytics and AI Advanced Certificate equips professionals with AI and data skills to improve decision-making and operations in health care.

Curriculum:

HSM437: Managing Health Care Operations

HSM464: Health IT and AI

HSM465: Health Care Data Visualization and Analytics

Students enrolled in the Analytics and AI Advanced Certificate will be required to complete Excel training as part of their orientation.

PMBA REQUIREMENTS AND CORE COURSE SEQUENCES

PROFESSIONAL MBA (PMBA)

To earn the Master of Business Administration degree, students in Simon's PMBA program take 10 core courses, 9 electives and a project course, with a minimum 3.0 cumulative grade-point average to complete the degree. Although not required, students may complete a concentration or minor. For more details on concentrations and minors please refer to pages 39-43. Students can earn a STEM designation for their MBA if 50% or more of the minimum credits required for the degree come from STEM designated courses. STEM designated courses are indicated with an asterisk (*).

CORE CURRICULUM

- ACC 401 Corporate Financial Accounting
- *CIS 401 Information Systems For Management
- *FIN 402 Capital Budgeting and Corporate Objectives
- *GBA 411 Business Modeling
- *GBA 412 Data Analytics
- MGC 406 Professional Communication: Persuasion and Influence
- MKT 402 Marketing Management
- *OMG 402 Operations Management
- *STR 401 Managerial Economics
- STR 421 Competitive Strategy or STR 403 Organization and Strategy (At least one of these two courses)

EXAMPLE PROGRAM SCHEDULE (Program is flexible, schedule may vary per student)
YEAR 1

FALL SEMESTER		SPRING SEMESTER		SUMMER TERM
FALL A	FALL B	SPRING A	SPRING B	
*STR 401 Managerial Economics	*OMG 402 Operations Management	ACC 401 Corporate Financial Accounting	*FIN 402 Capital Budgeting and Corporate Objectives	*CIS 401 Information Systems for Management
MKT 402 Marketing Management	*GBA 412 Data Analytics	STR 421 Competitive Strategy	MGC 406 Professional Communication: Persuasion and Influence	*GBA 411 Business Modeling
Fall Total Credit Hours: 10		Spring Total Credit Hours: 10		Summer Total Credit Hours: 5

All courses are 2.5 credits unless noted otherwise.

Minimum Degree Total Credit Hours: 51.5

In subsequent academic years, PMBA students will complete outstanding core and elective requirements, working with their academic advisor to construct a personalized program of study to meet their individual schedule needs. Students will typically complete their project during the Spring semester in their last academic year.

While the study grids contained in this book are accurate for the current year, the arrangement of courses is subject to change.

EMBA REQUIREMENTS AND CORE COURSE SEQUENCES

EXECUTIVE MBA (EMBA)

The Simon Executive MBA Program is geared toward working professionals. The unique lockstep curriculum sequence moves students through the initial foundational tools and functional knowledge before culminating in strategic application. There are 15 required courses, 3 electives, plus 2 optional complimentary courses. Students follow the lockstep program for the 15 courses and can take advantage of several course and delivery options for the electives. Students can earn a STEM designation for their MBA, if 50% or more of the minimum credits required for the degree come from STEM designated courses. STEM designated courses are indicated with an asterisk (*).

EXAMPLE PROGRAM SCHEDULE
YEAR 1

FALL SEMESTER		SPRING SEMESTER		SUMMER TERM
FALL A	FALL B	SPRING A	SPRING B	
*STR 401 Managerial Economics	*OMG 402 Operations Management	ACC 401 Corporate Financial Accounting	*FIN 402 Capital Budgeting and Corporate Objectives	*CIS 401 Information Systems for Management
*EXP 420 Managerial Decision Analysis	*EXP 422 Managerial Data Analysis	MKT 402 Marketing Management	STR 403 Organization and Strategy	EXP 476 Contemporary Marketing Strategy
Fall Total Credit Hours: 10		Spring Total Credit Hours: 10		Summer Total Credit Hours: 5

YEAR 2

FALL SEMESTER		SPRING SEMESTER	
FALL A	FALL B	SPRING A	SPRING B
*ACC 410 Managerial Accounting and Performance Measurement	Elective	Elective	*FIN 413 Corporate Finance and Capital Budgeting
STR 421 Competitive Strategy	*STR 422 Game Theory for Managers	Elective	EXP 485 New Venture Development
Fall Total Credit Hours: 10		Spring Total Credit Hours: 10	

All courses are 2.5 credits unless noted otherwise.

While the study grids contained in this book are accurate for the current year, the arrangement of courses is subject to change.

PART-TIME MASTER OF SCIENCE IN MEDICAL MANAGEMENT

Simon offers a part-time MS program in Medical Management to provide physicians, hospital administrators, and medical professionals with management tools and an understanding of the key business issues that confront health care providers. The part-time structure of the program allows health care professionals to maintain their career and personal commitments while in the program. The program focuses on developing health care managers and leaders who will be confident in making key financial, operational, and strategic decisions for their organizations.

Logistics and Time Requirements

The program is specifically designed to accommodate the busy schedules of physicians and medical professionals. The program consists of 31 credits and is offered on a part-time basis only.

The medical management student enrolls in a health care-specific class that meets one night per week. During the same term, the student also takes a class on Saturdays (typically two) to cover core business concepts.

Curriculum

The curriculum is designed around four core areas of management that are especially relevant to health care:

- Development of marketing and business plans
- Quantifying strategy through financial analysis
- Implementing strategy by efficiently managing operations; and
- Building efficient organizations for the long run, through intelligent work design, performance assessment, and employee incentives.

The curriculum is presented in a unique format that delivers the necessary depth of core business material while simultaneously applying that material to the health care industry. This is accomplished through the pairing of Simon's core courses with health care management courses that develop applications of the core material.

PART-TIME MS MEDICAL MANAGEMENT

FALL SEMESTER		SPRING SEMESTER		SUMMER TERM	FALL SEMESTER
FALL A	FALL B	SPRING A	SPRING B		
HSM 420 Business Economics of the Health Care Industry	HSM 425 Managerial Accounting for Health Care Organizations	HSM 452 Health Care Accounting and Finance	HSM 437 Managing Health Care Operations	HSM 465 Health Care Data Visualization and Analytics	HSM 455* Health Care Practicum I (3 credits)
HSM 454 Leading Health Care Organizations	HSM 451 Health Care Marketing and Business Plan Development	HSM 430 Health Sciences Management and Strategy	STR 403 Organization and Strategy	HSM 464 Health IT and AI	HSM 456* Health Care Practicum II (3 credits)

All courses are 2.5-credit hours unless indicated otherwise.

Minimum Degree Total Credit Hours: 31

*Students receive a grade of I (incomplete) in these courses which extend into part of the next term. The incomplete will be replaced with a grade upon completion of the courses.

While the study grids contained in this book are accurate for the current year, the arrangement of courses is subject to change.

MS IN BUSINESS ANALYTICS AND APPLIED AI (ONLINE)

Step into the future of business with a cutting-edge program that fuses analytics, AI, and innovation to turn data into powerful, real-world impact. In the MS in Business Analytics and Applied AI program, you will develop the comprehensive knowledge, mindsets, skills, applications, and tools needed to perform business analytics in support of data-driven decision-making and innovation. You will utilize probability, descriptive, causal, and predictive analytics to generate findings and brilliant insights from data, supporting informed business decisions. You will build a solid foundation in key analytics tools such as Python, SQL, Tableau, and Generative AI for data management, analysis, and visualization. You will apply frameworks for data-driven decision-making in various business functions, including marketing and organizational impact, using both qualitative and quantitative data. You will structure and solve complex business problems using a combination of analytics, experimental, and AI-driven methods, even with imperfect or incomplete data. You will identify and leverage opportunities for innovation using AI and advanced analytics in business contexts, particularly in FinTech. You will communicate your brilliant findings and data-driven insights effectively to both technical and non-technical audiences through storytelling, data visualization, and persuasive techniques. You will analyze and address ethical and policy challenges faced by tech firms, particularly in the context of ever-evolving AI and digital innovation. Finally, you will combine all your applied knowledge, analytics methodologies, and technical skills to solve a real-world business problem through a capstone project, based on your professional work experience or academic interests.

Logistics and Time Requirements

The MS in Business Analytics and Applied AI is a 12-month program (16 months if counting the summer break), targeted to both current and aspiring managers, analysts, and consultants with 3-15 years of work experience. All courses are online, with a mix of synchronous and asynchronous formats. Synchronous classes are held on weekday evenings. This is a part-time degree program; students take two (2) courses at a time during each seven (7)-week mini-semester.

Curriculum

In Year 1 Fall, you will build a strong technical and analytics foundation in a business context, all while exploring AI. In Year 1 Spring, you will build upon your foundation to develop your business decision-making skills in complex, data-driven environments. In Year 2 Fall, you will apply your learning to real-world challenges, developing your communications skills and management perspectives.

MS IN BUSINESS ANALYTICS AND APPLIED AI

FALL SEMESTER		SPRING SEMESTER		FALL SEMESTER	
FALL A	FALL B	SPRING A	SPRING B	FALL A	FALL B
*GBA 471 Probability and Descriptive Analytics	*GBA 472 Causal and Predictive Analytics	*CIS 467 Data Management and Warehousing	*MKT 472 Marketing Management Analytics	*GBA 474 Advanced Analytics-Driven Decisions	*GBA 475P Online Business Analytics Capstone Project
*GBA 465 Intro to Python Programming	*GBA 478 Introduction to AI & Business	*GBA 479 Generative AI and Business Applications	*GBA 473 Data-Driven Decision Making	GBA 476 Organizational Impact Using Analytics	GBA 444 Ethics & Policy in Tech
Fall Semester Credit Hours: 10		Spring Semester Credit Hours: 10		Fall Semester Credit Hours: 10	

All courses are 2.5-credit hours unless indicated otherwise.
Minimum Degree Total Credit Hours: 30

While the study grids contained in this book are accurate for the current year, the arrangement of courses is subject to change.

PHD REQUIREMENTS AND CORE COURSE SEQUENCES

The PhD Program at the Simon Business School is designed to equip students with the necessary analytical skills to carry out high-quality teaching and research in various fields of management. The Simon School confers a PhD in Business Administration. Our major fields of study include: Accounting, Finance, Marketing, Information Systems, and Operations Management.

Students build a firm foundation in economics, statistics, and their specific fields of study. Deeper specialization in coursework occurs in the second year when the students concentrate on their major fields of study. The PhD program is full-time only and consists of a minimum of 90 credit hours to include both coursework and research.

PhD Program Requirements vary by field of study with the exception of the Thesis Proposal and Thesis Defense.

Dissertation Proposal: Students are expected to submit a Thesis proposal paper along with a faculty advisor and committee. The exact form and timing of this proposal is defined by area requirements.

Dissertation Defense Seminar: The University of Rochester Graduate Student Office oversees all the Thesis Defense submissions. They have strict deadlines and policies that must be followed. See the University Graduate Studies Booklet Regulations Concerning Graduate Study, for a detailed description of the Final Oral Examination.

PhD Program Requirements by Field of Study:

Accounting

Required Courses:

ACC 501. Seminar in Accounting

ACC 510. Accounting Research I

AEC 513. IO Theory

AEC 515. Microeconomic Theory

ACC 511. Accounting Research II

AEC 510. PhD Workshop in Applied Economics

ACC 512. Adv. Topics in Acct. Research

AEC 520. Adv. Causal inference plus Machine Learning

ACC 513. Contemporary Topics in Acct.

ECO 484. Intro to Math Stat & Econometrics

FIN 505. Theory of Finance

ECO 485. Intro to Econometrics

FIN 512. Empirical Asset Pricing

ECO 487. Research in Applied Econometrics

FIN 513. Agency Theory

FIN 514. Empirical Corporate

Preliminary Requirement:

The Accounting Preliminary Exam is given in June at the end of the first year and consists of two parts. The exam is based on questions from the following courses:

FIN 505. Theory of Finance

ACC 510. Accounting Research I

ACC 511. Accounting Research II

ACC 512. Adv. Topics in Acct. Research

ACC 513. Contemporary Topics in Acct.

First Year Paper:

Each student must complete and successfully pass a research-oriented first year paper. The paper is due by September 15th of the second year for Accounting students. The paper will then be presented in AEC510 or in an Accounting Workshop by the end of the fall term of the student's second year.

Qualifying Exam and Second Year Paper: The Accounting Qualifying Exam consists of passing an examination on the second year paper by the end of the fall term of the third year. The paper is due by September 15th of the third year for Accounting students. This paper should be an original contribution to the literature in the specific major area. Students are scheduled to present their paper to a selected faculty committee in AEC510 that fall.

Finance

Required Courses:

ECO 484. Intro to Math Stat & Econometrics

FIN 505. Theory of Finance

ECO 471. Modern Value Theory I

FIN 511. Continuous Time Theory in Finance

ECO 485. Intro to Econometrics

FIN 512. Empirical Asset Pricing

ECO 487. Research in Applied Econometrics

FIN 513. Agency Theory

ECO 472. Modern Value Theory II

FIN 514. Empirical Corporate

AEC 510. PhD Workshop in Applied Economics

FIN 522. Adv. Empirical Asset Pricing

Preliminary Requirement:

The Finance Preliminary Exam is given in June at the end of the first year and consists of two parts.

The exam is based on questions from the following courses:

FIN 505. Theory of Finance

As well as one of the series below based on what courses are offered the first year:

FIN 511. Continuous Time Theory and

FIN 512. Empirical Asset Pricing

OR

FIN 513. Agency Theory and

FIN 514. Empirical Corporate

The exam is written and evaluated by a faculty committee. The committee will assign a combined grade to the exam for all parts.

First Year Paper:

Each student must complete and successfully pass a research-oriented first year paper. The paper is due by October 15th of the second year for Finance students. The paper will then be presented in AEC510 by the end of the fall term of the student's second year.

Qualifying Exam and Second Year Paper: The Finance Qualifying Exam consists of passing an examination on the second year paper by the end of the fall term of the third year. The paper is due by September 15th of the third year for Finance students. This paper should be an original contribution to the literature in the specific major area. Students are scheduled to present their paper to a selected faculty committee in AEC510 that fall.

Marketing

Required Courses:

MKT 505. Marketing Research PhD Wkshp

AEC 513. IO Theory

MKT 511. Core Research Topics Quant. Marketing

AEC 515. Microeconomic Theory

MKT 512. Quantitative Marketing Research

ECO 484. Intro to Math Stat & Econometrics

AEC 520. Adv. Causal Inference plus Machine Learning

ECO 485. Intro to Econometrics

AEC 523. Micro-Econ Model: Static Aprproach

ECO 487. Research in Applied Econometrics

AEC 524. Micro-Econ Model: Dynamic Approach

Preliminary Requirement: First-year Marketing PhD students will be required to demonstrate proficiency in the topics covered in a specific set of required classes. These courses fall into two categories, Econometrics and Marketing

Econometrics core courses as listed below. This sequence is taken through the University of Rochester Economics department.

ECO 484. Intro to Math Statistics/Intro to Econometrics

ECO 485. Introduction to Econometrics

For these courses, students need to obtain a 3.3 (B+) GPA average. Failure to meet this average GPA indicates not meeting the milestones of the program and can result in being asked to leave the program, retake the courses, or demonstrate sufficient knowledge through other courses or means.

Marketing core courses consist of four different required classes:

AEC 520. Adv. Causal Inference plus Machine Learning

MKT 511. 1st year Core Research Topics in Quantitative Marketing

MKT 511. 2nd year Core Research Topics in Quantitative Marketing

AEC 523 or AEC 524. Microeconometrics Static (or Dynamic) Approaches. At least one of these courses must be taken to demonstrate depth of skills in microeconometrics.

First Year Paper: Each student must complete and successfully pass a research-oriented first year paper. The paper is due by October 15th of the second year for Marketing students. The paper will then be presented in a Marketing Seminar by the end of the fall term of the student's second year.

Qualifying Exam and Second Year Paper: The Marketing Qualifying Exam consists of passing an examination on the second year paper by the end of the fall term of the third year. The paper is due by September 15th of the third year for Marketing students. This paper should be an original contribution to the literature in the specific major area. Students are scheduled to present their paper to a selected faculty committee in a Marketing Seminar that fall.

Information Systems and Technology

Required Courses:

MSM506: Stochastic Processes: Theory and Applications

AEC 515. Microeconomic Theory

CIS512. Advanced Topics in Information Systems

AEC 520. Adv. Causal Inference plus Machine Learning

MSM 522. Optimization

ECO 484. Intro to Math Stat & Econometrics

MSM 542. Queuing Theory and Applications

ECO 485. Intro to Econometrics

CIS 511. Research Topics and Methods in IS

ECO 487. Research in Applied Econometrics

Preliminary Requirement:

First-year Information Systems and Technology PhD students will be required to demonstrate proficiency in the topics covered in a specific set of required classes as listed below:

CIS 511. Research Topics and Methods in Information Systems

MSM506: Stochastic Processes: Theory and Applications

MSM 522. Optimization

AEC 515. Microeconomic Theory

For these courses students need to obtain a 3.3 (B+) GPA average.

First Year Paper:

Each student must complete and pass a first-year paper requirement, due by the end of the summer term (August 31st) of their first year. The student must identify a topic of interest in the area of research (business analytics, information systems, or operations). The topic must have the scope for original research. The student is expected to research the literature to find the state of the art in these areas and to properly place the problem in the context. Problem identification and some effort at originality is sufficient for the first-year paper. The work for the paper is to be done independently by the student, but the student may seek guidance and feedback from faculty. The student will present his/her work to a committee of IS Faculty, to be selected by the PhD Faculty Committee, that will grade the first-year paper using the PhD Standard Evaluation Grading.

Second Year Paper:

The Information Systems and Technology second year paper consists of students work on an individual research topic in conjunction with the faculty to write a research paper. This paper is due by May 31st of the end of the second year. The student will present his/her work to a committee of IS Faculty, to be selected by the PhD Faculty Committee, that will evaluate the papers using the PhD Standard Evaluation Grading.

Candidacy Qualifying Exam:

The Information Systems and Technology Qualifying Exam is due by November 30th of the third year. This paper should be an original contribution to the literature in the specific major area and is usually a more in depth version of the paper used for the second year paper. The paper should be presented to the com-

mittee (formed before the second year paper) by January 15th that will evaluate the paper and presentation.

Operations Management

Required Courses:

AEC 515. Microeconomic Theory

MSM506: Stochastic Processes: Theory and Applications

AEC 520. Adv. Causal Inference plus Machine Learning

MSM 511. Advanced Topics in Operations Management

BST 401. Probability Theory

MSM512. Ops Mngt: Bus. Problem Context

MSM518. Adv. Business Modeling

MSM 522. Optimization

MSM 532. Machine Learning for Business Analytics

MSM 542. Queuing Theory and Applications

Preliminary Requirement:

A committee of OM faculty reviews students after the first year in early June. The expectation is that students would receive B+ or higher in all of their courses. In addition, the expectation is that students would receive A- or higher in the following courses:

AEC 515. Microeconomic Theory

MSM506: Stochastic Processes: Theory and Applications

MSM 522. Optimization

First Year Paper:

By the end of spring term of their first year (May 31st), students should pick two research questions. By the end of summer term (August 31st) of their first year, students should deliver initial drafts of the papers based on the two research questions that would include: a problem statement, initial problem formulation, and a literature review. The student will present his/her work to a committee of OM Faculty, to be selected by the PhD Faculty Committee, that will grade the first-year paper using the PhD Standard Evaluation Grading. Successful completion of the initial drafts and presentation constitutes passing the Preliminary requirement and first-year paper.

Second Year Paper:

The Operations Management Second Year Papers consists of the student's work on two individual research topics to write two research papers. These two papers are due by May 31st of the end of the second year. The student will present his/her work to a committee of OM Faculty, to be selected by the PhD Faculty Committee, that will evaluate the papers and the presentation.

Candidacy Qualifying Exam:

The Operations Management Qualifying Exam is due by November 30th of the third year. This paper should be an original contribution to the literature in the specific major area and is usually a more in depth version of one of the two papers used for the second year papers. The paper should be presented to the committee (formed before the second year paper) by January 15th and will be evaluated using the PhD Standard Evaluation Grading.

DOCTOR OF BUSINESS ADMINISTRATION (DBA) REQUIREMENTS AND CORE COURSE SEQUENCES

As data accessibility and new technology reshape how organizations operate, staying competitive requires continuously advancing your knowledge. Through Simon's Doctor of Business Administration (DBA) program, you'll sharpen your business acumen, master cutting-edge tools, and unlock new career and teaching opportunities. You'll also earn the highest terminal degree from a highly ranked business school, while gaining a powerful new approach to navigating and solving complex business challenges.

The Simon Business School DBA program will launch in the Summer of 2026

DBA Program Requirements

Through Simon's structured, 54-credit curriculum, you will learn to conduct doctoral-level research and have the flexibility to tailor your studies to your career and interests.

You will also have the opportunity to choose between two tracks: the practice track, which focuses on solving real-world business challenges, and the teaching track, which emphasizes teaching and action-based learning.

DBA Curriculum

Years 1 and 2

Foundation and Review courses:

MSM 491: Math Review

GBA 511: Probability, Statistics and Regression Analysis

MGC 502: Writing for Research

Research Methods courses:

CIS 533: AI and Machine Learning for Business

GBA 523: Econometrics and Causal Design

GBA 521: Research Methods

GBA 549: Business Fundamentals Paper

Core Topics and Seminar courses:

DBA 511: Core Topics 1

DBA 512: Core Topics 2

DBA 565: Core Thesis Seminar

Elective courses

Throughout the program, you will have an opportunity to select elective options from a range of Simon's program offerings.* You will have the option to take a doctoral-level communication course designed specifically for the DBA; and, if you are on the teaching track, you will have two elective options specifically designed to prepare you to teach business education.

*Ph.D. courses may require instructor permission.

Year 3

In the third year of the program, you will focus on your thesis. Peer learning will be emphasized, as you will be learning alongside a small group of students with interests similar to your thesis topic. You will also benefit from mentorship from a Simon faculty member whose expertise is relevant to your chosen thesis topic.

Depending on your particular interest area, you may opt for a nontraditional thesis. For instance, you might do a project tackling a challenge in their current place of work; or, if you are on the Teaching Track, you might focus on action-learning or curriculum development that leads to the design of a new course.

DBA Program Intensives

In-person intensives will serve as an opportunity to network with your DBA community – your peers and the DBA faculty – emphasizing collaborative learning and community building. Online intensives give you with the flexibility to leverage remote learning. The online orientation is three hours, in-person residencies are 3 – 5 days, and online intensives (via Zoom) are two partial weekend days in the morning.

Customize Your DBA to Your Goals and Interests

Simon's DBA program is designed for you to customize your studies. You will develop your specialization through a common curriculum that is tailored by electives, pro-seminar style topics and seminar courses customized to student interests, and your thesis.

Tracks

A unique element of Simon's DBA program is the ability to choose between two tracks – a practice track and teaching track – enabling you to customize your studies to your professional interests and goals.

Practice Track:

The primary track for the program, the practice track focuses on applying DBA-level research and cutting-edge tools to solve real-world business challenges.

This track is intended for those with a variety of motivations to achieve the DBA – from tackling a major analytical project at your current organization to preparing for a strategic career pivot to launching a consulting practice.

Teaching Track:

The teaching track emphasizes instruction and action-based learning. This track is intended for those who want to launch a teaching career at a business school or bolster their credentials as a current business instructor.

To earn the Teaching Track designation a student must meet four additional requirements:

1. Completing DBA501

2. Completing DBA502

3. Completing a research paper related to instructional design and delivery techniques or research related to curriculum and instruction, such as an action-learning project while teaching a lab, workshop, or course module under advisor guidance.

4. Completing a thesis related to instructional design and delivery or research related to curriculum development.

Core Course Titles

CIS 533: AI and Machine Learning for Business

DBA 511: Core Topics 1: Strategy and Organizational Structure

DBA 512: Core Topics 2

DBA 565: Core Thesis Seminar

GBA 511: Probability, Statistics and Regression Analysis

GBA 521: Research Methods

GBA 523: Econometrics and Causal

GBA 549: Business Fundamentals Paper

MGC 502: Writing for Research

MSM 491: Math Review

Elective Course Titles

DBA 501: Innovative Teaching for Business Educators

DBA 502: Instructional Observation and Insights

*Students will have the ability to choose other Simon courses to fill out their elective requirement depending on their area of interest and specific track that they have chosen

MBA CONCENTRATIONS

Students are not required to, but can choose one or more Concentrations. They provide opportunities for students to tailor curriculum to better meet job market needs. The concentrations are focused on entry-level MBA positions, have curricular and co-curricular content, and students will work closely with the Office of Student Engagement, and Career Management Center for consistent guidance for success in the academic coursework, co-curricular activities, and career goals. STEM designated courses are indicated with an asterisk (*)

CONSULTING CONCENTRATIONS	FINANCE CONCENTRATIONS	MARKETING CONCENTRATIONS
Strategy	Banking	Brand Management
Pricing	Asset Management	Product Management
Technology	Venture Capital & Private Equity	
Operations	Corporate Finance	

CONSULTING CONCENTRATIONS

Strategy

No required courses

Choose 3:

MKT/STR438 B2B Pricing
*MKT/STR439 Advanced Pricing
STR403 Organization and Strategy
*STR422 Game Theory for Managers
*STR423/MKT414 Pricing Policies
STR424 Human Resource Strategy
*HSM420 Business Economics of the Health Care Industries

Choose 3, including any from above:

*ACC410 Managerial Accounting and Performance Measurement
*ACC411 Financial Statement Analysis with Data Analytics
*CIS415 Business Process Analysis and Design
ENT423 New Venture Creation and Innovation
*FIN413 Corporate Finance and Capital Budgeting
*FIN438 Mergers and Acquisitions
*FIN439 Corporate Restructuring
GBA435 Negotiation Theory and Practice: Bargaining for Value
*MKT421 Advanced Marketing Strategy
MKT432 New Product Strategy
*OMG415 Process Improvement
STR425 Innovation Strategy
STR428 Strategy Beyond Markets

Pricing

*MKT414/STR423 Pricing Policies

Choose 2:

MKT/STR438 B2B Pricing
*MKT/STR439 Advanced Pricing
*MKT440 Pricing Analytics
*STR422 Game Theory for Managers

Choose 3, including any from above:

*ACC410 Managerial Accounting and Performance Measurement
GBA435 Negotiation Theory and Practice: Bargaining for Value
*GBA436 Causal and Predictive Analytics
*HSM420 Business Economics of the Health Care Industries
*MKT412 Marketing Research
*MKT421 Advanced Marketing Strategy

CONSULTING CONCENTRATIONS (continued)

Technology

*CIS415 Business Process Analysis and Design
*CIS417 Introduction to Business Analytics
CIS461 Strategy and Business Systems Consulting Practicum

Choose 3:

*ACC410 Managerial Accounting and Performance Measurement
*CIS413 Managing Digital Products and Platforms
*CIS434 Social Media and Text Analytics
*CIS/MKT437 Digital Marketing Strategy
*CIS/FIN446 Financial Technology
*GBA478 Introduction to AI and Business
*OMG411Supply Chain Analytics
*OMG415 Process Improvement
*OMG416 Project Management

Operations

*ACC410 Managerial Accounting and Performance Measurement
CIS461 Strategy and Business Systems Consulting Practicum
*OMG411 Supply Chain Analytics
*OMG415 Process Improvement

Choose 2:

*CIS415 Business Process Analysis and Design
*OMG416 Project Management
STR403 Organization and Strategy
STR424 Human Resource Strategy

FINANCE CONCENTRATIONS

Banking

*ACC411 Applied Financial Statement Analysis with Data Analytics
*FIN411 Financial Markets and Investments
*FIN413 Corporate Finance and Capital Budgeting
*FIN430 Advanced Capital Budgeting and Strategic Financial Management

Choose 3:

ACC423 Financial Reporting I
ACC424 Financial Reporting II
*BPP426 Macroeconomic Policy: Choices and Outcomes
*FIN424 Financial Options and Strategic Flexibility
*FIN438 Mergers and Acquisitions
*FIN439 Corporate Restructuring
*FIN/CIS446 Financial Technology
*FIN448 Debt Markets and Fixed Income Strategies

Asset Management

*ACC411 Applied Financial Statement Analysis with Data Analytics
*FIN411 Financial Markets and Investments
FIN421 Asset Management
*FIN424 Financial Options and Strategic Flexibility

Choose 3:

*ACC447 Reporting Analytics in Financial Markets
*BPP426 Macroeconomic Policy: Choices and Outcomes
*FIN418 Quantitative Investing
*FIN449 Real Estate
*FIN448 Debt Markets and Fixed Income Strategies

FINANCE CONCENTRATIONS (continued)

Venture Capital and Private Equity

*ACC411 Applied Financial Statement Analysis with Data Analytics
*FIN411 Financial Markets and Investments
*FIN413 Corporate Finance and Capital Budgeting

Choose 4:
ACC423 Financial Reporting I
*CIS413 Managing Digital Products and Platforms
ENT423 New Venture Creation and Innovation
*FIN424 Financial Options and Strategic Flexibility
*FIN438 Mergers and Acquisitions
*FIN439 Corporate Restructuring
*FIN443 Private Equity
*FIN449 Real Estate
*FIN/CIS446 Financial Technology

Corporate Finance

*ACC411 Applied Financial Statement Analysis with Data Analytics
*ACC410 Managerial Accounting and Performance Measurement
*FIN411 Financial Markets and Investments
*FIN413 Corporate Finance and Capital Budgeting
*FIN439 Corporate Restructuring

Choose 2:
*ACC418 Taxes and Business Strategy
ACC423 Financial Reporting I
ACC424 Financial Reporting II
*FIN424 Financial Options and Strategic Flexibility
*FIN438 Mergers and Acquisitions

MARKETING CONCENTRATIONS

Brand Management

*MKT412 Marketing Research
*MKT414/STR423 Pricing Policies
*MKT421Advanced Marketing Strategy
MKT441Brand Management Workshop

Choose 3:
*CIS434 Social Media and Text Analytics
MKT431 Consumer Behavior
MKT432 New Product Strategy
MKT433 Advertising Strategy
*CIS/MKT437 Digital Marketing Strategy
*MKT/STR439 Advanced Pricing
*MKT440 Pricing Analytics
MKT448 Brand Strategy
MKT449 Global Marketing Strategy

Product Management

*MKT412 Marketing Research
MKT413 Applied Product Management
*MKT414/STR423 Pricing Policies
*MKT421Advanced Marketing Strategy
MKT432 New Product Strategy

Choose 2:
*CIS413 Managing Digital Products & Platforms
*CIS417 Introduction to Business Analytics
*CIS434 Social Media and Text Analytics
*CIS/MKT437 Digital Marketing Strategy
ENT423 New Venture Creation and Innovation
GBA435 Negotiation Theory and Practice: Bargaining for Value
*GBA436 Causal and Predictive Analytics
MKT433 Advertising Strategy
MKT/STR438 B2B Pricing
*MKT/STR439 Advanced Pricing
*MKT440 Pricing Analytics
STR403 Organization and Strategy
STR425 Innovation Strategy
STR437 Leading a Culture of Innovation

MBA MINORS

Students will also have the option to complete a minor consisting of 4 courses in areas that are either cross-functional or functional (see chart below). Most functional minors are contained in one or more concentrations. Students fulfilling a concentration (e.g., Banking) do not in addition earn the minor for the respective function (e.g., Finance). Thus, except for Accounting, functional minors are intended for students who do not complete a concentration in the same functional area. Also, a student cannot use more than two courses counting towards their concentration to also count towards a cross-functional minor. STEM designated courses are indicated with an asterisk (*)

CROSS-FUNCTIONAL MINOR	FUNCTIONAL MINOR
Analytics	Accounting
Leadership	Finance
Innovation and Entrepreneurship	Marketing
Global Business	Consulting: Strategy and Pricing
Health Sciences Management	Consulting: Operations and Technology

MINORS
CHOOSE ANY 4 OF THE COURSES LISTED UNDER EACH MINOR
CROSS-FUNCTIONAL

ANALYTICS
*ACC447 Reporting Analytics in Financial Markets
*CIS417 Introduction to Business Analytics
*CIS431 Big Data
*CIS432 Machine Learning for Business Analytics
*CIS434 Social Media and Text Analytics
*CIS437/MKT437 Digital Marketing Strategy
*CIS467 Data Management and Warehousing
*FIN418 Quantitative Investing
*GBA424 Analytics Design & Applications
*GBA436 Causal and Predictive Analytics
*GBA464 Programming for Analytics
*GBA478 Introduction to AI and Business
*MKT412 Marketing Research
*MKT440 Pricing Analytics

LEADERSHIP
GBA435 Negotiation Theory and Practice: Bargaining for Value
GBA439 Elements of Leadership
GBA441 Business Ethics & Corporate Social Responsibility
STR403 Organization and Strategy
STR424 Human Resource Strategy
STR427 Organizational Behavior
STR437 Leading a Culture of Innovation

INNOVATION AND ENTREPRENEURSHIP
BPP433 Business Law and Policy
ENT423 New Venture Creation and Innovation
*FIN449 Real Estate
GBA435 Negotiation Theory and Practice: Bargaining for Value
MKT413 Applied Product Management
*MKT421 Advanced Marketing Strategy

INNOVATION AND ENTREPRENEURSHIP (continued)
MKT432 New Product Strategy
STR425 Innovation Strategy
STR437 Leading a Culture of Innovation

GLOBAL BUSINESS
*BPP426 Macroeconomic Policy: Choices and Outcomes
*BPP442 International Economics and Finance
*FIN442X International Finance (Switzerland)
MKT449 Global Marketing Strategy

HEALTH SCIENCES MANAGEMENT
*HSM420 Business Economics of the Health Care Industry
HSM425 Managerial Accounting for Health Care Organizations
HSM/STR430 Health Sciences Management and Strategy
HSM440 Evolving Medical Markets
HSM452 Health Care Accounting and Finance
HSM454 Leading Health Care Organizations

FUNCTIONAL

ACCOUNTING

*ACC410 Managerial Accounting and Performance Measurement
*ACC411 Applied Financial Statement Analysis with Data Analytics
*ACC418 Taxes and Business Strategy
ACC423 Financial Reporting I
ACC424 Financial Reporting II
ACC/HSM425 Managerial Accounting for Healthcare Organizations
*ACC447 Reporting Analytics in Financial Markets

FINANCE

*BPP426 Macroeconomic Policy: Choices and Outcomes
*BPP442 International Economics and Finance
*FIN411 Financial Markets and Investments
*FIN413 Corporate Finance and Capital Budgeting
*FIN418 Quantitative Investing
FIN421 Asset Management
*FIN424 Financial Options and Strategic Flexibility
*FIN430 Advanced Capital Budgeting and Strategic Financial Management
*FIN438 Mergers and Acquisitions
*FIN439 Corporate Restructuring
*FIN442X International Finance (Switzerland)
*FIN443 Private Equity
*FIN/CIS446 Financial Technology
*FIN448 Debt Markets and Fixed Income Strategies
*FIN449 Real Estate

MARKETING

*GBA 436 Causal and Predictive Analytics
*MKT412 Marketing Research
MKT413 Applied Product Management
*MKT414/STR423 Pricing Policies
*MKT421 Advanced Marketing Strategy
MKT431 Consumer Behavior
MKT432 New Product Strategy
MKT433 Advertising Strategy
*MKT437 Digital Marketing Strategy
MKT/STR438 B2B Pricing
*MKT/STR439 Advanced Pricing
*MKT440 Pricing Analytics
*MKT441Brand Management Workshop
MKT448 Brand Strategy
MKT449 Global Marketing Strategy
MKT451 Consumer and Brand Research

CONSULTING: STRATEGY AND PRICING

MKT/STR438 B2B Pricing
*MKT/STR439 Advanced Pricing
STR403 Organization and Strategy
*STR422 Game Theory for Managers
*STR423/MKT414 Pricing Policies
STR424 Human Resource Strategy
STR425 Innovation Strategy
STR428 Strategy Beyond Markets

CONSULTING: OPERATIONS AND TECHNOLOGY

*CIS413 Managing Digital Products and Platforms
*CIS415 Business Process Analysis and Design
*CIS417 Introduction to Business Analytics
*CIS434 Social Media and Text Analytics
*GBA478 Introduction to AI and Business
*OMG411 Supply Chain Analytics
*OMG415 Process improvement
*OMG416 Project Management

SPECIALIZED DEGREE PROGRAMS

Simon offers programs that allow students to receive a first-rate business education tailored to their specific needs. In addition to the Full- and Part-Time MBA Programs, a few other opportunities are available to students who wish to pursue coursework within a more specialized context of business management.

MA/MBA PROGRAM

The Eastman School of Music and Simon Business School, both of the University of Rochester, are offering students the opportunity to earn a Master of Arts in Music Leadership in combination with a Master of Business Administration for Professionals degree. Drawing upon the resources of Eastman and Simon, this combined degree opportunity is the first to pair a conservatory level music administration degree with an MBA. Increasingly, musicians are expected to demonstrate artistic and managerial skills to succeed in these leadership roles. The opportunity to combine the Master of Arts in Music Leadership and Masters of Business Administration courses of study provides a one-of-a-kind experience for comprehensive preparation in music leadership and business.

Students will be accepted into the combined degree program through each school's separate admissions process and will complete the full Eastman Music Leadership curriculum as part of Eastman's Institute for Music Leadership, and Simon's MBA mandatory core. Students will spend the first summer and full academic year at Eastman, then transition to full-time Simon for a second summer and full academic year, and conclude both programs with the Music Leadership capstone internship or mentorship during the third summer.

Applicants wishing to pursue the combined Music Leadership and MBA degrees must apply through both Eastman's Master of Arts in Music Leadership application process and the Simon Business School's application processes.

For additional information, contact:

Andrew Brayda
Director of Admissions
Simon Business School
245 Gleason Hall
Rochester, N.Y. 14627-0107
(585) 275-3533
E-mail: andrew.brayda@simon.rochester.edu

MD/MBA PROGRAM

Along with Simon, the School of Medicine and Dentistry offers a combined MD/MBA degree program in Health Sciences Management. This program is designed to prepare physician managers who can respond intelligently, effectively, and creatively to the changing health care services industry. Only candidates with exceptional promise and academic records will be considered.

To participate in this program, students must apply to, and be accepted by both the School of Medicine and Dentistry and Simon Business School. MD/MBA applicants are required to take the MCAT for the MD program, while the MBA program has moved to a test-optional policy that allows applicants to be considered for the MBA without submitting the GMAT or GRE. The program takes five years to complete—taken separately, the MD is four years and the MBA is one year. Students start the program at the Simon School for the first-year core courses and the majority of electives, and then move to the MD program on a full-time basis, completing the remaining Simon electives in their third and fourth years of medical school.

For addittional information, contact:

Michelle Vogl
Director of Admissions
University of Rochester
School of Medicine and Dentistry
601 Elmwood Avenue
Box 601A
Rochester, N.Y. 14642-8603
(585) 275-4542
E-mail: Michelle_Vogl@URMC.Rochester.edu

Andrew Brayda
Director of Admissions
Simon Business School
245 Gleason Hall
Rochester, N.Y. 14627-0107
(585) 275-3533
E-mail: andrew.brayda@simon.rochester.edu

ARTICULATION AGREEMENTS

MSA PROGRAM: MILES EDUCATION AND RELATED TRANSFER CREDIT ARTICULATIONS

In December of 2023, the University of Rochester's Simon Business School signed an agreement with a third-party provider, Miles Education. Miles will provide student recruiting services for the enrollment of international students in Simon's full-time MS in Accountancy program. This agreement is intended to provide new opportunities for experienced accountants in India to benefit from Simon's MS in Accountancy degree program. In addition to recruiting, Miles provides a set of services related to its primary business in CPA test preparation that Simon does not normally directly offer. Simon will continue to administer all educational programming, as well as maintain oversight of all marketing and recruitment efforts. Any student grievances related to interactions with Miles should be referred to the Assistant Dean of Students.

In relation to Simon's partnership with Miles, Simon also instituted an internal policy for accepting transfer credits from Jagdish Sheth School of Management. This agreement follows our standard approach of vetting courses, the institutions, and the relationship between the courses and our curriculum.

Articulation Of Transfer Credit

Name of program:
Simon Business School + JAGSoM

Name of schools and/or departments:
Simon Business School
Jagdish Sheth School of Management - India

Purpose (including intended student population and the NYSED codes for all programs to be included):
The Simon Business School reviewed the curriculum and courses of the Jagdish Sheth School of Management (JAGSoM) to determine a policy for transferring credits from JAGSoM into the Simon Masters of Science in Accounting (MSA) program. JAGSoM is accredited by AACSB (Simon's business school accreditor). It is globally ranked in QS Masters Global Ranking 2023 in 101+ Band for PGDM Marketing, 101+ Band for PGDM Analytics & Digital Business, and 151+ Band in PGDM Finance. JAGSoM is ranked All India 10th for Future Orientation, as well as All India 14th for Learning Experience. Moreover, JAGSoM is ranked 13th amongst private business schools in India. Simon faculty have reviewed the curriculum and syllabi of JAGSoM and determined that the following courses can transfer into the Simon MSA program.
Accountancy (MS): NYSED Program Code 29991

Specific coursework (including grades or other criteria for transfer of credits):
In total, students enrolling in the Simon MSA program can transfer 10.5 credits to meet their program requirements, as specifically described below. For a course taken to be eligible to transfer, the student must earn at least the equivalent of a B (3.0 out of 4.0) grade in Simon's grading schema. An allowance for such transfers will be defined in the student's offer of admission and determined at the point of admission. The specific transfer of credits is as described in the table below:

JAGSoM Course (Credits)	Simon MSA Course (Credits)
Business Data Analytics and Data Visualization (3 credits)	ACC446 Accounting/FinTech (3 credits)
Advanced Financial Reporting (3 credits)	ACC423 Financial Reporting I (2.5 credits)
Advanced Federal Income Tax (3 credits)	ACC440 Basic Income Tax – Business Entities & Gift/Estate Taxes (2.5 credits)
Information Systems & Controls (3 credits)	CIS401 Information Systems Management (2.5 credits)
JAGSoM = 12 credits	Simon Total to Transfer = 10.5 credits

Benefits to the student as part of the articulation:
The total credits that Simon will accept toward the MSA program is 10.5 credits. Students can send questions regarding this agreement to Simon Admissions at admissions@simon.rochester.edu.

Policy Administration Notes:
This transfer policy originated for the 2025 MSA cohort and is applicable only for students entering in the cohort year of the course catalog in which it is housed. The policy is reviewed annually along with the course catalog review process.

MS TO EMBA

The EMBA program is aimed at managers preparing for the next phase of their career and already have experience working in business. Students who completed a relevant Simon Business School MS program, and have sufficient work experience, can transfer course credits to the Executive MBA program. Each transcript will be reviewed to determine whether the student meets the eligibility requirements for the MS to EMBA program transfer.

A maximum of 24 credits of the 45 credits required for the EMBA may be transferred, enabling these students to complete the EMBA in a condensed time frame (approximately one year). Transfer credits will be reviewed on a case-by-case basis to ensure that learning outcomes, and materials covered, are similar and warrant credit. Students must have received a grade of "B" or better in a course for it to be considered for transfer credit.

INTERNATIONAL IMMERSIONS

International Immersions are classes that bring both a corporate and cultural element to the coursework. Teaching occurs both in the US and in the destination country, and is focused on one of the core elements of Simon instruction. These immersions break down the ethnocentrism as students discover the infusion of culture and business in the daily practices of alumni, company owners, senior executives and entrepreneurs. International Immersions are set so travel will occur during winter and spring break and will not take away traditional class time.

SWITZERLAND IMMERSION: FIN 442X. INTERNATIONAL FINANCE

This course is designed to give students an immersive experience into Swiss culture, business and international finance. The three elements of this experience are classwork, cultural experiences and company visits. The classwork is taught both in the US and in Switzerland and focuses on elements of international finance and the macro and micro-effects on the Swiss and other international economies. Class sessions and corporate visits are held in Bern and Thun where students hear directly from the companies about economic influences discussed in class. Cultural experiences are designed to help understand how the public lives in Switzerland, including historic sites in Lucerne and towns in the Swiss Alps.

BRAZIL IMMERSION: MKT 449X. GLOBAL MARKETING STRATEGY IN BRAZIL

Offered as a traditional elective course, MKT 449 is also offered every other year as an Immersion Course, developing the concepts of marketing strategy, as well as design and implementation in the context of the Brazilian market. The course examines the importance of bilateral information flows between the firm and the marketplace in defining new product requirements, changing com¬petitive conditions, product advertising, and strategic commitment, all through the lens of the cultural, political, and geographic needs and challenges of Brazil. Students will engage with corporate leaders from regional and international firms in industries including consulting, SaaS, and energy, as well as with other business school students and Simon alums. Visits and cultural exploration will take place in Sao Paolo and Rio de Janeiro. The on-campus course work will culminate with a final project focusing on the development of a marketing strategy for a Brazilian-based business or Brazilian facing audience. After immersion in Brazil, students will reflect on their decisions and strategy submissions, incorporating what they have learned from their time in-country into their revisions.

COURSE DESCRIPTIONS

A course schedule showing offerings, times, and instructors for each term is available from the Simon Registrar's Office prior to the start of each term. STEM designated courses are indicated with an asterisk (*). All courses are 2.5 credits unless noted otherwise.

■ACCOUNTING

Joanna Wu, Area Coordinator

MASTERS LEVEL COURSES

ACC 401. CORPORATE FINANCIAL ACCOUNTING

Corporate financial accounting is concerned with the form and content of the information firms disclose to external parties (e.g., shareholders). In the United States, financial reporting is based on generally accepted accounting principles (GAAP) set by the Financial Accounting Standards Board (FASB). GAAP define the accounting methods and disclosure practices that firms select from when providing financial statements to external parties. This course covers these principles and other important financial reporting practices. The primary focus of the course is developing the skills required to interpret and analyze financial information, rather than the skills required to prepare financial statements. Upon completion of the course, students will appreciate how financial accounting information is used in contracts between parties (e.g., lenders and the firm) and to evaluate a firm's past performance and potential future performance.

*ACC 410. MANAGERIAL ACCOUNTING AND PERFORMANCE MEASUREMENT

In contrast to the external reporting perspective of Corporate Financial Accounting (ACC 401), Managerial Accounting and Performance Measurement (ACC 410) focuses on strategic decision making within the organization. The course is oriented towards training business professionals to comprehend and utilize their organization's internal accounting system to assist them in strategic decision making. The course provides students with a framework to understand accounting systems, and demonstrates how such an understanding of the underlying cost structures facilitates managers in evaluating profitability of individual products and customers. In addition, the course delves into issues of performance measurement, with special emphasis on the C-suite and the role of corporate governance actors such as the board in effectively monitoring CEO (and CFO) performance.

In addition to covering the basic conceptual principles underlying managerial accounting, the course has a significant data analytics component with MS Excel and Stata being the primary data analysis tools used (the course outline indicates sessions where we will analyze data). Examples of data analytics exercises include – (i) using publicly available financial reporting data (under GAAP) to analyze cost structures for specific industries, companies or macroeconomic cycles, (ii) using publicly available CEO (and CFO) compensation data to analyze the mapping between pay and performance, (iii) studying the role of corporate governance in mitigating "excess" compensation being paid to the CEO (or CFO).

MBA Prerequisites: ACC 401, STR 401

*ACC 411. APPLIED FINANCIAL STATEMENT ANALYSIS WITH DATA ANALYTICS

The objective of this course is to develop and sharpen your analytical ability to use financial information to perform various types of applied economic and financial analysis. Managers formulate a firm's business strategy and make operating, investing, and financing policy decisions to implement that strategy. The outcomes of those decisions are reflected in the firm's financial statements which, along with other financial information, are used by equity and debt analysts, investors, lenders, creditors, bondholders, loan officers, debt-rating agencies, and numerous other external parties to evaluate the firm's current economic performance and to forecast its future economic performance. A key aspect of the course is the link between managers' strategic decisions and the resulting performance that gets reflected in the firm's financial statements. This course develops the analytical and technical skills and related applied analysis techniques required to perform a wide variety of economic analyses using financial information. Among other things, applied financial analysis requires knowledge of the various techniques used to analyze financial information such as common-size and trend analysis, ratio analysis, modeling the predictable cash flow effects of sales growth, models of financial distress, forecasting techniques, valuation models, as well as the ability to select and apply the appropriate techniques in a given economic setting. This course develops your ability to perform economic analysis in a wide variety of real-world settings using a number of different applied financial analysis techniques.

MBA Prerequisites: ACC 401, FIN 402

*ACC 417. AUDITING

Auditing principles and procedures are examined. This course includes an analysis of auditing and its relationship with financial reporting with emphasis on the independent accountant's attest function as well as the consideration of ethics, legal responsibility, and regulatory influences. Statistical sampling and the role of the internal auditors as well as compilation and review reports are discussed.

MBA Prerequisite: ACC 401

*ACC 418. TAXES AND BUSINESS STRATEGY

The goal of this course is to help students develop the tools required to identify, understand and evaluate tax-planning opportunities, develop a framework for understanding how taxes affect profitability and cash flow implications of business decisions, and develop the data gathering, mathematical and modeling skills needed to maximize the after-tax economic effects of those business decisions. Optimal strategic decision making requires that the often-significant tax consequences of strategic alternatives are effectively and explicitly accounted for. Ignoring the tax consequences of decisions will lead to suboptimal outcomes for the firm's stakeholders. Effective tax planning (e.g., the integration of taxation impacts on strategic decisions) requires the planner to:

- Be able to identify and gather the relevant data to appropriately analyze and evaluate the tax implications of a proposed transaction for all parties to the transaction
- Consider not only explicit taxes (tax dollars paid directly to taxing authorities), but also implicit taxes (taxes paid indirectly in the form of lower before-tax rates of return on tax-favored investments)

- Recognize that taxes represent only one among many business costs: in the planning process, all costs must be considered, including the costly restructuring of the business necessary to implement some tax plans

While the course will introduce key tax rules and laws in areas where taxes typically play a large role in strategic alternatives, memorizing detailed tax laws and becoming a tax specialist is not a goal of the course. Tax rules and laws change over time and from jurisdiction to jurisdiction. Rather, it is a goal of this course to provide future managers with an analytical, mathematical, modeling and conceptual framework to incorporate tax rules into the strategic decision making process, regardless of the particular tax laws in effect at any given point in time or in any particular taxing jurisdiction.

After establishing a fundamental tax planning framework using the themes referenced above, the learning objectives of this course are, using differential equations, present value concepts and modeling software, to operationalize the established conceptual framework to real-life business decisions such as:

- Alternative investment opportunities
- Capital structure
- Compensation planning
- Organizational form
- Asset pricing
- Tax arbitrage
- Mergers and acquisitions
- Maximizing value of tax attributes
- International tax planning for multinational ventures

MBA Prerequisites: ACC 401, FIN 402

ACC 423. FINANCIAL REPORTING I

This course acquaints students with the conceptual and practical problems in measuring revenues and expenses, assets and liabilities. The principal objective is to make students proficient in assessing the financial position of a company, its cash flow, liquidity, capital structure, hidden liabilities, and reserves through an understanding of generally accepted accounting principles (GAAP). The course provides a practical overview of the structure of accounting and its relation to finance and economics that should continue to be valuable as the accounting environment changes.

MBA Prerequisites: ACC 401, FIN 402

ACC 424. FINANCIAL REPORTING II

This course addresses the accounting for mergers and acquisitions, foreign operations, and derivative financial instruments. Emphasis is placed on developing an appreciation of the forces shaping accounting, including the effects of organizational arrangements, information and taxes. The interdependency of the accounting methods, organizational structure, and tax decisions are investigated.

MBA Prerequisites: ACC 401, FIN 402

ACC 436. RESEARCH INTO PROFESSIONAL ACCOUNTING STANDARDS

This course will cover the conceptual framework for standard-setting established by the Financial Accounting Standards Board (FASB). It will also review how to research financial accounting and reporting issues using the FASB Accounting Standards Codification. The research of financial accounting and reporting issues will be applied to professional accounting decisions in financial reporting, disclosure and other accounting decision making. In addition, a comparison of US Generally Accepted Accounting Principles (US GAAP) and International Financial Reporting Standards (IFRS) will be included. The course concludes with a review of the impact of governmental and not-for-profit accounting standards on financial reporting.

MBA Prerequisites: ACC 401, ACC 423

ACC 437. BASIC FEDERAL INCOME TAX ACCOUNTING - INDIVIDUAL

This course will introduce the federal tax system in the United States and will focus on specifics of federal tax code. It will provide an overview of individual income taxes. Detailed topics will include, but are not limited to, gross income, deductions for adjusted gross income, deductions from adjusted gross income, taxable income, recognition of gains and losses. Skills will be developed to research the tax issues and determine the proper reporting.

MBA Prerequisite: ACC 401

*ACC 438. ACCOUNTING INFORMATION SYSTEMS

Accounting information systems (AIS) will be covered in depth with a focus on security in an information technology (IT) environment. This course will also focus on complying with the Sarbanes-Oxley Act as it relates to internal control systems. Various IT issues will be discussed such as designing databases, implementing effective controls, network security, and operating in an IT environment. The functions of accounting will be examined in a technological environment.

MBA Prerequisite: ACC 401

*ACC 439. ACCOUNTING ANALYTICS FOR FORENSICS

According to the Kroll Global Fraud Report, 69% of business surveyed report suffering a financial loss as a result of fraud. This course is designed to give students skills in the area of fraud investigations. This course will delve into the analytical methodologies used during forensic accounting investigations and expose the student to how access and excel can be used in conjunction with analytics to provide evidence required in forensic accounting investigations. Throughout the different analytical topics, access and excel will be used.

MBA Prerequisite: ACC 401

ACC 440. BASIC INCOME TAX – BUSINESS ENTITIES AND GIFT/ ESTATE TAXES

This course will introduce the federal tax system in the United States and will focus on specifics of federal tax code. It will provide an overview of partnership, corporate, gift and estate taxes. Detailed topics will include, but are not limited to, gross income, taxable income, recognition of gains and losses, transactions between partners, Subchapter S Corporations, gift tax and estate tax. Skills will be developed to research the tax issues and determine the proper reporting.

MBA Prerequisite: ACC 401

*ACC 441. GOV/NONPROFIT SUSTAINABLE AND RESPONSIBLE ACCOUNTING

Governments and non-profit organizations make up a sizable portion of the U.S economy. In addition, in the for-profit sector, there is a new emphasis on sustainability and responsible accounting also known as Environmental, Social and Governance (ESG). This course will examine the accounting for governments, which includes full accrual basis of accounting, but also the modified accrual basis of accounting unique to governments. In addition, this course

will exam accounting for not-for-profit organizations and will focus on accounting for colleges and universities as well as healthcare organizations. Finally, this course will look at the history of sustainability accounting and review the latest financial disclosure requirements related to ESG for public and private companies.

ACC 445. MANAGERIAL ACCOUNTING FOR HEALTH CARE ORGANIZATIONS

(Same as HSM 425)

This course will introduce students to accounting concepts and then the focus of the course will shift into managerial accounting. Costs for health services continue to rise faster than overall economic growth drawing ever greater attention from employers, governments and consumers. The front line of the cost battle is within the health services entities where decision making depends on accurate reporting of internal costs. This course will allow the student to understand how costs are reported and how to use this information to make decisions within the health services entity. The following topics will be examined within a health services setting: cost allocation, cost-volume-profit analysis, budgeting and variance analysis, and transfer pricing.

ACC 446. ACCOUNTING/FINTECH

Technology has been changing in accounting for many years from the invent of the spreadsheet, still in use today to the new technologies of today, such as generative artificial intelligence (generative AI). In addition, the use of accounting information in data analytics is critical to managing businesses. This course aims to show a variety of technological tools that can be used in the accounting field and in using accounting information with data analysis tools to make crucial business decisions. Through-out the course, Microsoft Excel, Microsoft Co-Pilot and Chat GPT will used in different scenarios. In addition, the course will conclude with a new and fascinating area of crypto currency.

*ACC 447. REPORTING ANALYTICS IN FINANCIAL MARKETS

The objective of this course is to introduce students to the concepts and methodologies of financial reporting-based data analytics from a USER-driven rather than a producer-driven mindset. It is NOT to train students to become data scientists or data analysts, but rather to train business managers to utilize new types of data and techniques to solve business problems more effectively.

The primary focus will be to build predictive models using financial statement information that can predict future outcomes of interest such as future earnings; future stock prices; future economic growth etc. The first part will focus on traditional models based on sales, earnings per share etc., while the latter part will expand the repertoire to non-quantitative data such as textual analysis of annual reports.

The learning objectives are (i) bringing students up-to-date with the latest developments in the field of predictive analytics (as it pertains to financial reporting); and (ii) demonstrating how students can design and implement prediction models built on economic theory that harness the power of modern tools to more effectively solve business problems. Students will be taught to use these tools from the perspective of a business manager who uses the data once these are made available rather than a data analyst who creates the data and delivers them.

The course will be general enough to be interesting to the wider student pool irrespective of career tracks – but it is more likely to be chosen by students who have an interest in financial markets.

MBA Prerequisite: ACC 401

PHD COURSES

ACC 501. SEMINAR IN ACCOUNTING

1 credit (First-year PhD students are graded on a P/F basis. Second-year and later students receive a letter grade.)

A forum for the presentation, discussion, and critique of current accounting research papers where accounting faculty, PhD students, and outside speakers present working papers on current research topics. Students are expected to actively participate in the discussion and critique of the papers presented. In weeks when accounting workshops/seminars are scheduled, accounting PhD students will meet as a group with a member of the accounting faculty before the seminar to discuss the paper. Since such meetings are designed to facilitate students' active participation in the seminars, students are required to circulate a brief set of comments to the other class participants in advance of the meeting. Grading will be based on the quality of students' contributions to the pre-seminar meetings as well as their contributions and participation in the actual workshops.

ACC 510. ACCOUNTING RESEARCH I

3 credits

This course focuses recent developments in capital markets research by exploring topics such as how technology intertwines with the production, dissemination, and consumption of accounting information, the incentives and impact of financial intermediaries, and financial reporting regulation and externalities. In addition to the informational role of accounting information, the course also explores its stewardship role by covering recent papers related to executive compensation and incentive structure. Finally, the course expands beyond the U.S. setting by covering topics related to international accounting. Given the turnover of course topics over time, students are required to enroll in ACC 510 each time the course is offered.

ACC 511. ACCOUNTING RESEARCH II

3 credits

Content varies from year-to year based on faculty and student's interests. Topics selected reflect areas of active interest to accounting researchers/accounting profession. Topics covered in recent offerings of the course include: "Information Acquisition"; "Soft Information in Financial Markets"; "Private Interactions: Broker Conferences, Roadshows, In-House Meetings"; "The Financial Reporting Environment"; "The Role of Accounting in the Municipal Bond Market"; "Textual Analysis/Information and Financial Markets"; "Rivals, Information Transfer, Spillovers and Investment Decisions"; "Rivals, Information Transfer, Spillovers and Financial Policies and Corporate Governance and Other Decisions; "Rivals, Information Transfer, Spillovers and Proprietary Costs"; "Aggregate Market Relations"; "Patents and Patent Disclosure"; "Return Predictability" and "Anomalies". Given the turnover of course topics over time, students are required to enroll in ACC 511 each time the course is offered.

Prerequisite: ACC 510

ACC 512. ADVANCED TOPICS IN ACCOUNTING RESEARCH

This course (along with ACC 513) is the next step in the sequence of accounting

seminars taken by the Ph.D. students. ACC 512 builds on the "classics" covered in prior seminars by applying the insights to topical areas of research interest. It focuses on international aspects of accounting research, such as the interaction between country-level institutional features and financial reporting outcomes, cross-border information flows, harmonization of financial reporting standards and its implications for actual outcomes (both reporting and economic). This course alternates with ACC 513. Given the turnover of course topics over time, students are required to enroll in ACC 512 each time the course is offered.

Prerequisites: ACC 510 and ACC 511ACC

ACC 513. CONTEMPORARY TOPICS IN ACCOUNTING RESEARCH

3 credits

In contrast to the international focus of ACC 512, ACC 513 focuses on the U.S. setting, and in particular on new/emerging theories in financial economics. The course seeks to stimulate discussions on the implication of these theories for accounting research. Recent versions of the course focused on the feedback-effect of stock prices, where managers not only impound information into the stock price, but also learn new information from their firms' stock prices; and on asset-pricing anomalies, and the role of financial accounting information in mitigating or exacerbating the prevalence of these market-pricing "irregularities". Given the turnover of course topics over time, students are required to enroll in ACC 513 each time the course is offered.

Prerequisites: ACC 510 and ACC 511

■ APPLIED ECONOMICS

Michael Raith, Area Coordinator

PHD COURSES

AEC 506. PROBABILITY THEORY

This course teaches Random Variable, Distribution, Independence; Transformations and Expectations; Common Families of Distributions; Multiple Random Variables, and Markov Chains. Offered in the summer, primarily for entering doctoral students.

AEC 510. PHD WORKSHOP IN APPLIED ECONOMICS

3 credits

The workshop provides a forum for the presentation of ongoing and completed research projects by PhD students in the economics core. Third- and fourth-year PhD students are expected to participate actively.

Prerequisite: permission of the instructor

AEC 513. INDUSTRIAL ORGANIZATION THEORY

3 credits

This course provides an introduction to the theory and practice of industrial organization. Broad areas of application include static oligopoly models, two-stage games and games with infinite horizons. Concepts from game theory such as Nash equilibria, subgame perfect equilibria, and perfect Bayesian equilibria will be used as needed. Special topics may include: contracts, patents, licensing, bundling, tying, buyer-seller networks, switching costs, price discrimination, mergers and entry barriers.

AEC 515. MICROECONOMIC THEORY

4 credits

This course is part of the Simon School's core curriculum for PhD students and covers fundamentals of microeconomic theory at a graduate level. It deals with modeling the economic choices faced by consumers and firms in a market economy, and studying how those choices, and the resulting market outcomes, respond to changes in the economic environment. The material is mathematical, and familiarity with the required mathematical methods is for the most part assumed. The focus will be on economic concepts, methods, intuition and applications.

AEC 520. ADVANCED CAUSAL INFERENCE PLUS MACHINE LEARNING

3 credits

This class is intended to provide PhD students with an advanced treatment of causal inference as well as a gentle introduction to frontier machine learning techniques that are useful in economic applications. From the machine learning toolkit, we will cover Lasso and Random Forests in detail, along with recent approaches to inference with HD nuisance parameters. Deep Learning will be covered only briefly. R packages for implementation of Lasso and Forests will be introduced. We will then consider the three canonical approaches to causal inference: the Rubin framework, the Pearl framework and the Heckman synthesis. Randomized control trials and associated methods of inference (Fisher exact p-values and randomization inference) will be covered briefly. We will then consider recent approaches based on synthetic control and matrix completion. We next turn to methods based on selective choice, including Roy models and control functions.

Finally, we will consider some issues related to IV approaches, including problems of weak or many instruments (and a Lasso-based solution) and the local/selected nature of resulting estimands (LATE and MTE).

AEC 523. MICRO-ECONOMETRIC MODELING: STATIC APPROACHES

3 credits

This course introduces students to canonical modeling approaches for analyzing decision making by both firms and consumers, focusing on static environments. Central topics include demand estimation, models of strategic interaction, networks and platforms and auctions. Applications include firm pricing decisions, new product introductions, strategic entry and vertical relationships. The course generally includes coding assignments and student presentations, in addition to the weekly lectures on methods and applications.

AEC 524. MICRO-ECONOMETRIC MODELING: DYNAMIC APPROACHES

This course examines consumer and firm behaviors that involve inter-temporal trade-offs and as a result involve dynamic optimization on the part of both consumers and firms. It begins with an overview of dynamic programming methods, in both single and multi-agent settings, emphasizing methods that link estimation with computation. Single agent topics include models of capital replacement, dynamic demand, inventory models and salesforce management. Multi-agent topics include strategic innovation, learning by doing, demand smoothing, and product repositioning. A strong emphasis is placed on recent methods and frontier topics. The course generally includes coding assignments and several student presentations, in addition to weekly lectures.

■ BUSINESS ENVIRONMENT AND PUBLIC POLICY

Michael Raith, Area Coordinator

MASTERS LEVEL COURSES

*BPP 426. MACROECONOMIC POLICY: CHOICES AND OUTCOMES

This course covers the impact of policymaking by governments (especially central banks like the Federal Reserve) on economic and financial market outcomes such as inflation, interest rates, exchange rates, growth, and employment. Special attention will be paid to current policy and data events.

BPP 433. BUSINESS LAW AND POLICY

3 credits

A foundational knowledge of the American legal system is essential for business owners, fiduciaries, and accountants. This course covers the basic structure of the United States legal system along with a detailed overview of contract law and business enterprises formation and governance. There is a particular emphasis on partnerships, corporations, and limited liability companies. The Course also examines the fundamentals of securities regulation, intellectual property, tort law, and the doctrine of fiduciary duty. Case study will be a major component of the Course.

*BPP 442. INTERNATIONAL ECONOMICS AND FINANCE

This course covers the basics of international finance and economics. Topics in international finance include exchange rate concepts, the history of the international monetary system, the market for foreign exchange, international parity relationships, and exchange rate risk management. Topics in international economics include the evolution of world trade, the basic theory of trade and trade policy, and monetary policy in a global environment.

Prerequisite: FIN 402

■ CAREER MANAGEMENT CENTER

MASTERS LEVEL COURSES

CMC 400. MBA CAREER STRATEGY & PROFESSIONAL READINESS

This course provides MBA students with structured, actionable career preparation tailored to the U.S. job market. Focused on personal branding, networking, and professional readiness, the curriculum prepares students to navigate recruiting processes effectively - it enhances competitiveness for internships and full-time roles and deepens connections to alumni and employers.

CMC 460. MS CAREER STRATEGY & PROFESSIONAL READINESS

This course provides MS students with structured, actionable career preparation tailored to the U.S. job market. Focused on personal branding, networking, and professional readiness, the curriculum prepares students to navigate recruiting processes effectively – it enhances competitiveness for internships and full-time roles and deepens connections to alumni and employers

■ COMPETITIVE AND ORGANIZATIONAL STRATEGY

Michael Raith, Area Coordinator

MASTERS LEVEL COURSES

*STR 401. MANAGERIAL ECONOMICS

The primary objective of the course is to train students to think in economic terms, to identify the relevant economic issue in a given situation, to separate the relevant from the irrelevant, and to analyze the implications of alternative actions. Another objective is to provide an increased understanding of markets. The course presents the basic analytical tools of microeconomics, particularly as those skills are relevant to managers. Important economic concepts used in subsequent courses, such as opportunity costs and a Nash Equilibrium, are covered. Applications of marginal analysis are stressed.

STR 403. ORGANIZATION AND STRATEGY

This course teaches how to approach and solve a wide range of organizational design problems, whether as manager at any level, entrepreneur, or consultant. In a world in which most sources of competitive advantage are fleeting, organizational effectiveness has emerged as a key source of long-run competitive advantage. Conversely, many corporate failures can be traced to poor internal organization. Problems covered range from individual job design to the structure of entire organizations and the boundaries of the firm (e.g., M&A decisions or vertical integration). The course discusses in detail the assignment of decision rights (including centralization vs. decentralization of decisions), performance measurement, and incentives and rewards. These are the three elements of "organizational architecture," a central framework of the course. Throughout, the course stresses the importance of fit between a firm's internal organization and its strategy. The course adopts an analytical-economic perspective grounded in agency theory, motivated by a wealth of evidence that people respond to incentives (very broadly defined) in predictable ways. That said, it does not reduce organizational problems to economics, but addresses their managerial and behavioral dimensions too, drawing on insights from psychology and sociology as appropriate.

MBA Prerequisite: STR 401

STR 421. COMPETITIVE STRATEGY

Competitive strategy deals with the most significant decisions that companies make in the marketplace, including entry into a market, product positioning, pricing, investments, technology choice and acquisitions. This course provides tools and concepts for analyzing these decisions and for designing business strategies that help firms make above-normal profits in the long run. Throughout the course, there is an emphasis on how firms interact with existing or potential competitors and other parties in the market. The tools and concepts used to understand this interaction are partly those of the traditional field of Strategic Management, but more importantly those of modern microeconomics, especially the field of Industrial Organization.

The first half of the course looks at the "big picture" and covers industry analysis, value creation and competitive advantage, and integration and diversification decisions. The second half of the course focuses on strategic interaction among firms, and covers specific topics such as the dynamics of price competition in oligopolies, commitment strategies of firms, entry and exit, networks and standards, and technological competition. The course is largely case-based. About one third of all classes are lectures; the other two thirds are case discussions.

MBA Prerequisite: STR 401

*STR 422. GAME THEORY FOR MANAGERS

This course develops game-theoretic tools that can be used to provide both quantitative and qualitative prescriptions for

profit-maximizing behavior in a variety of strategic settings. The basic concepts are introduced through applications to strategic settings that one encounters in typical business situations. However, the game-theoretic concepts themselves are quite general, as the goal of the course is provide students with both an understanding of these concepts, and a tool kit with which to evaluate a broad range of strategic problems. The set of strategic problems specifically discussed includes the pricing of new and existing goods in the presence of substitutes and complements, determining advertising and R&D expenditures, analyzing market entry, exit, and entry deterrence opportunities, and evaluating bargaining and auction environments. Extensive use is made of examples from both private- and public sector analyses of strategic interactions among firms.

MBA Prerequisite: STR 401

*STR 423. PRICING POLICIES

(Same as MKT 414)

This course prepares future managers to analyze the environment in which their firm operates in order to arrive at an appropriate pricing policy for their products or services. Topics include (i) relevant costs (i.e., which costs are relevant for pricing decisions), (ii) elasticity of demand, and (iii) market segmentation (e.g., through the offering of a product line, or by means of bundling, tying, menus of two-part tariffs, quantity discounts, and other direct and indirect means of price discrimination). The course will also cover essential pricing analytic tools such as break-even analysis and economic value analysis, and it will provide a solid introduction into the pitfalls of pricing in a competitive environment and how to anticipate competitor responses. Lastly, the course will cover the legal aspects of pricing as appropriate.

MBA Prerequisites: MKT 402, STR 401

MS Prerequisite: GBA 463

STR 424. HUMAN RESOURCE STRATEGY

Intended for general managers and not limited to HR specialists, this course addresses human resource management issues and practices that align with organizational strategy, mission, vision, and values. It explores recruitment, selection, training, career development, performance evaluation, compensation, unions, labor and employment law, equity, and inclusion such that HR initiatives improve organizational, group and individual outcomes. Students learn and practice data/people analytical tools to increase decision-making effectiveness and efficiency.

MBA Prerequisite: STR 401

STR 425. INNOVATION STRATEGY

Innovation is central to most modern businesses. This course introduces frameworks to analyze and develop strategies for innovative firms: What determines the profitability of a technological innovation? Which risks are more worth taking? How do firms transform innovation into a competitive advantage? When should incumbents buy an innovative entrant? How does internal firm structure adapt to innovation?

The course is designed for students anticipating taking product or development management positions in innovative firms, new-technology analyst positions in investment firms, or management consultant or strategy positions for such firms.

Throughout the quarter, we will develop concepts and frameworks grounded in economic and business strategy principles to address these and related questions. By the end of the quarter, you will be able to identify and discuss:

· The form and function of good innovation strategy

· The "Technological S-curve" and the emergence of dominant design

· Disruptive and Sustaining innovation

· Business eco-systems and the role of enabling technologies

· Strategy for Data Products

· Commercialization strategies for innovation: collaboration, licensing, patenting and entrepreneurship

· Acquiring and integrating innovative firms

· Open vs. Closed innovation

· Outsourcing and crowdsourcing innovation

STR 427. ORGANIZATIONAL BEHAVIOR

This course presents behavioral concepts that influence individual, group, and organizational effectiveness. Particular emphasis is given to motivation, culture, globalization, leadership, group dynamics, communication, organizational structure and change. Students develop ways of thinking about organizational problems to increase individual and organizational effectiveness. Multiple stakeholder perspectives and systemic approach to organizational problems are emphasized.

STR 428. STRATEGY BEYOND MARKETS

We repeatedly observe top executives caught off-guard when faced with "nonmarket" threats such as proposed government regulations or activist pressure. But the concept of strategy beyond markets extends further than reactively responding to threats. Managers also have the opportunity to shape the nonmarket environment in ways that advantage their firm. In this course, we will develop a framework for constructing nonmarket strategies and integrating them with market strategies. We will cover a broad range of topics, including the legislative process, regulation, activism, corporate social responsibility, and crisis management. We will also study the special challenges facing global firms and innovative firms. Class sessions will be highly interactive and will emphasize the real-world applicability of the frameworks and theories we discuss in class.

STR 430. HEALTH SCIENCES MANAGEMENT AND STRATEGY

(Same as HSM 430)

This course applies the principles of organizational economics and strategy to the institutional setting of health sciences. The course focuses on the interdependence between the delivery, financing, and technology sectors of the health care marketplace. It discusses how management and strategy choices within each sector are responses to the unique institutional factors in the health care marketplace and how the strategies of each sector affect the behavior of the others. Students will leave the course with an ability to think productively about management and strategy challenges within each of the three health science sectors.

MBA Prerequisite: STR 401

Recommended: STR 403, STR 421

STR 437. LEADING A CULTURE OF INNOVATION

Creativity is our only unlimited resource. Time, money, and physical resources are restricted and limited, but creativity is not. As a leader, it then follows that the creativity of the people you serve is the

only unlimited resource that a company has, and it is the leader's responsibility to maximize it. This course teaches leaders how to tap into creativity, through the purposeful development of culture as it occurs in the language, context, experience, and mindsets of the people you lead. The goal is to maximize the innovation that occurs on your teams because of your leadership. The focus of this course is on developing an understanding of the language of leadership, the integration of different forms of empathy into leadership practices, and the criticality of crisp language constructs for building the shared context which enhances innovation. We will study the leadership behaviors that lead to innovation and those that impede it. We will leverage the sciences of human intrinsic motivation, social intelligence, group motivation, business leadership and culture building. The intention is to develop capacities that will help students understand and deploy leadership behaviors that will help the teams and companies that they lead be more resilient and adaptable in the face of complexity, uncertainty, volatility, and incessant technological change.

STR 438. B2B PRICING

(Same as MKT 438)

Students will learn the major differences in pricing strategies between selling to consumers (STR 423) and to other firms, which then deal with consumers. The course starts by analyzing the pricing problem of a manufacturer selling to a retailer. We examine the issue of double marginalization, and learn how two-part tariffs get us out of this problem. We also examine different forms of contractual relations—from vertical acquisitions to regular short-term contracts—and potential issues with every form, touching on transfer pricing and outsourcing. In the second part of the course, we analyze a crucial concept of cost pass-through (how much a retailer should decrease the retail price in response to a decrease in the wholesale price) and the effect of manufacturer's advertising on the retailer and on the channel overall. This course is a natural continuation of STR 423 Pricing Policies for those who are interested in working in an industry where a significant portion of sales is done through independently-owned retailers, whether students are planning on working on the retailer side or on the manufacturer side of this industry

Prerequisite: MKT 414/STR 423

*STR 439. ADVANCED PRICING

(Same as MKT 439)

This course builds on MKT 414/STR 423 to equip students with the skills to make profitable pricing decisions in complex business environments. Topics include: pricing with constrained supply and uncertain demand; markdown management; advance selling; pricing on the internet; selling through auctions; pricing in markets with (direct and indirect) network effects; and psychological aspects of pricing.

Prerequisite: MKT 414/STR 423

STR 461. STRATEGY AND BUSINESS SYSTEMS CONSULTING PRACTICUM

(Same as CIS 461 and OMG 461)

This course provides an introduction to strategy and business systems consulting. It is primarily aimed at those exploring career opportunities in consulting but will also help students become savvy consumers of consulting services. It includes a live project helping a client at a real organization answer an important question or achieve a significant business objective. Student teams work together to deliver a set of well-reasoned impactful recommendations based upon thoughtful analysis of the relevant facts. In this way students consolidate their understanding of the problem solving approaches introduced in GBA401 through experiential learning.

■ ENTREPRENEURSHIP

Dennis Kessler, Area Coordinator

MASTERS LEVEL COURSES

ENT 423. NEW VENTURE CREATION AND INNOVATION

The focus of ENT 423 is learning how to prepare an effective business plan that will communicate the value of the concept. Among the critical issues that will be addressed are competitive conditions and industry trends, sustainable competitive advantages, management, marketing, financial plan, exit possibilities, franchising, and legal entities. The approach used is appropriate for start-ups and for corporate venturing. It is also suitable for both profit and for not-for-profit organizations. At the same time plans are prepared, other entrepreneurial issues are studied, such as assembling resources, launching and building new ventures and harvesting results. Lectures, a prominent case study, and guest speakers are utilized. The speakers are entrepreneurs at various stages in their careers and will provide an interesting context to the entrepreneurial endeavor. The course will address a range of new venture topics from the development of management teams, marketing, finance, ven00000ture capital and legal issues. The completion of a business plan for a proposed new venture is required.

ENT 435. NEGOTIATION THEORY AND PRACTICE: BARGAINING FOR VALUE

(Same as GBA 435)

This course surveys the theoretical and behavioral underpinnings of negotiation practices and develops skills that enhance the ability to capture value in cooperative and competitive bargaining scenarios. Students participate in and evaluate several cooperative and competitive negotiation simulations. Grades depend, in large part, on performance in these exercises.

■ FINANCE

Ron Kaniel, Area Coordinator

MASTERS LEVEL COURSES

*FIN 402. CAPITAL BUDGETING AND CORPORATE OBJECTIVES

This course provides an introduction to financial analysis and capital budgeting with an emphasis on the valuation of real investment projects. Topics discussed include: analysis of the firm's choice among alternative investment projects, the term structure of interest rates, modern portfolio theory and the valuation of risky assets, the estimation of free cash flows, capital structure choices, and the cost of capital.

MBA Prerequisites: GBA 400

*FIN 411. FINANCIAL MARKETS AND INVESTMENTS

Investments includes discussion of the efficient-markets theory of the dynamic behavior of prices in speculative markets, along with empirical evidence for the validity of the theory; evaluation of the implications of the efficient-markets theory for the profitability of alternative investment strategies; exploration of the implications of portfolio theory for equilibrium asset prices and the measurement of risk; emphasis on the empirical evidence for various mean-variance and multifactor models of asset pricing and

the use of these models for evaluating portfolio performance; and introduction to special topics in financial markets, such as arbitrage pricing theory, and options and futures contracts.

MBA Prerequisite: FIN 402

MS Prerequisite: GBA 462, FIN 462

*FIN 413. CORPORATE FINANCE AND CAPITAL BUDGETING

This course provides an intensive analysis of the effects of various corporate financial policy decisions on the value of the firm, including a discussion of the effects of taxes, bankruptcy costs, agency costs and asymmetric information on these decisions. It then examines the interrelation of financing policy with payout policies, trade credit, executive compensation, leasing, and hedging. The course provides an understanding of the theoretical issues involved in the choice of these policies.

MBA Prerequisite: FIN 402

MS Prerequisite: GBA 462, FIN 462

*FIN 418. QUANTITATIVE INVESTING

The objective of this course is to equip you with the frameworks, tools, and methodologies necessary to build and/or be an educated user of quantitative models for financial decision making. The course is suitable for students seeking a career in finance, but also for students with broader interests who wish to strengthen their general modeling skills, and it does not require any quantitative background other than what is covered in the MBA core courses. Master modeling frameworks such as regression analysis, Monte-Carlo simulation, optimization, and binomial trees. Learn how to apply these frameworks in financial contexts such as portfolio management, term-structure estimation, capital budgeting, risk measurement, risk analysis in discounted cash flow models, and pricing of European, American, exotic, and real options. The modeling tools will be illustrated by applying them to a variety of real-world cases.

MBA Prerequisite: FIN 402, GBA 412, GBA 485A

MS Prerequisite: FIN 462, GBA 462, (GBA464 or GBA485A)

FIN 421. ASSET MANAGEMENT

The course will provide students with a fundamental understanding of the principles and analytics of asset management as applied to both institutional and private clients. It should be of great interest to anyone aspiring to a career in asset, portfolio, private wealth, endow ment, foundation, sovereign wealth, or pension fund management. A fundamental understanding of the issues in asset management, whether institutional or private, will also be helpful in other areas of finance such as investment banking, insurance, accounting and personal finance, as well as operations and marketing in these types of firms. In addition, students will learn how to better manage their future personal wealth.

This class will focus on the more practical aspects of asset management to prepare students for the actual demands of a job in the industry. The course will also describe the challenges in managing such portfolios from the perspective of an institutional or individual investor and a fund manager (public equity, fixed income, hedge, or liquid).

Prerequisite: FIN 411

*FIN 424. FINANCIAL OPTIONS AND STRATEGIC FLEXIBILITY

This course provides intensive study of the fundamental ideas of option-pricing theory and their application to options, financial futures and other securities; analysis of hedging with forward and futures contracts; development of the Black-Scholes option-pricing formula, its uses and modifications, and generalizations of the model; and discussion of the structure and organization of options and futures markets, and the exploration of empirical evidence on the validity of option-pricing models. Analyses of the pricing of options on futures, foreign currency, portfolios and indexes, commodity prices, bond prices, and interest rates are included as time permits.

Prerequisite: FIN 411 (can be concurrent)

*FIN 430. ADVANCED CAPITAL BUDGETING AND STRATEGIC FINANCIAL MANAGEMENT

"Prepare for the dark while it is light." In an era marked by significant economic uncertainty and rapid technological advancements, the ability to identify, measure, and mitigate financial risks has become indispensable for finance professionals.

This course delves into the multifaceted landscape of financial risk management, covering a broad range of topics including market risk, credit risk, liquidity risk, and operational risk. Through a combination of theoretical frameworks, case studies, and practical applications, students will develop a deep understanding of the various types of risks faced by corporations and financial institutions, as well as the tools and methodologies employed to manage them effectively.

MBA Prerequisite: FIN 411

*FIN 438. MERGERS AND ACQUISITIONS

This course is a comprehensive graduate course in corporate finance that is taught using in-class lec-tures, class notes, and cases, each of which requires a team report and negotiated deals involving co-operation and competition with other teams. The subjects covered include corporate valuation as ap-plied to friendly mergers and hostile takeovers. We also will cover relevant issues in securities regula-tion, insider trading law, and corporate-governance law.

MBA Prerequisite: ACC 401, FIN 402

MS Prerequisite: ACC 401, FIN 462

*FIN 439. CORPORATE RESTRUCTURING

This course will enable the students to acquire a good understanding of the fundamental causes of restructuring events; the legal framework in which restructuring occurs; the likely consequences and risks involved in pursuing various restructuring strategies. After taking the course, students will be capable of deriving the value of securities issued by firms undergoing a restructuring events (with a particular focus on distressesd firms. They will learn about famous restructuring cases and controversies, and will be exposed to the views of guest speakers who pursued a career in M&A and restructuring.

MBA Prerequisite: ACC 401, FIN 402

MS Prerequisite: ACC 401, FIN 462

*FIN 442X. INTERNATIONAL FINANCE & SWITZERLAND IMMERSION

This course is designed to give students an immersive experience into Swiss culture, business and international finance. The three elements of this experience are classwork, cultural experiences and company visits. The classwork is taught both in the US and in Switzerland and focuses on elements of international finance and the macro and micro-effects on the Swiss and other international economies. Class sessions are held in Thun and business trips are scheduled to Swiss

companies in Bern and Zurich where students hear directly from the company about economic influences discussed in class. Cultural experiences are designed to help understand how the public lives in Switzerland, including historic sites in Lucerne and towns in the Swiss Alps.

MBA Prerequisite: ACC 401, FIN 402

MS Prerequisite: ACC 401, FIN 462

*FIN 443. PRIVATE EQUITY

The Private Equity and Venture Capital [PE/VC] industry is more in the popular press than ever before; funds are larger and more diverse than in any past generation, deals are bigger, scope is worldwide, and wealth-generation seems to be at levels heretofore unseen. Many argue that PE/VC drives major segments of national economies more than ever before, and that it is essential that the industry is better understood and weighed more heavily in the thinking and plans of policy-makers in government and commerce. This course provides exposure to what PE/VC is and how it works. We cover, among other things; the make-up of funds, the composition and operation of PE/VC firms, dealing sourcing, due diligence and investment process, and the roles of partnerships, GPs, LPs, 'activists' and Boards. At a higher level, we cover industry performance and competition, fund creation, some international aspects of the business, and differing approaches to financing in different alternative asset categories.

*FIN 446. FINANCIAL TECHNOLOGY

(Same as CIS 446)

This course provides an introduction to the evolving use of technology in financial markets and applications. One area of focus is "blockchain" technology in financial transactions, markets, permanent historical records and cryptocurrencies. The other major area of focus is innovations such as peer-to-peer transactions and the use of artificial intelligence in evaluating and funding investments. Throughout we will consider the prospects for the success of the new technologies, asking questions such as: How revolutionary are the various parts of Fintech? What are the hidden pitfalls of the technology/business models to individuals, companies and/or society? How will major financial institutions and governments react? What changes are required in legal rules (including internationally) to accommodate Fintech? The course will require working with large data sets (the blockchain) and specific cryptocurrency implementations. While computer programming skills are not required as a pre-requisite, success in the course will require that students learn the basics of the computer science concepts of public-key cryptography, data verification, and simple programming structures (loops, branching).

MBA Prerequisite: FIN 402

MS Prerequisite: FIN 462

*FIN 448. DEBT MARKETS AND FIXED INCOME STRATEGIES

The objective of this course is to undertake a rigorous study of fixed-income securities and markets. A variety of fixed-income securities will be discussed including coupon bonds, callable and putable bonds, sinking fund provisions, and floating rate notes. Interest rate derivatives such as forwards and futures on fixed-income securities, bond options, options on bond futures, caps, floors, and collars will also be discussed. In addition, we will study some tools that are useful in bond portfolio management including horizon analysis, duration, optimization techniques for constructing bond portfolios and modes for pricing fixed-income securities. While the perspective of this course is from the viewpoint of a bond investor, a person in corporate finance needs to understand similar material. Evaluating an investment in a fixed-income security is the mirror image of the problem faced by a corporation in deciding whether or not to issue a bond.

Prerequisite: FIN 411

*FIN 449. REAL ESTATE

This course provides an introduction to, and an overview of, real estate as a capital asset and as a major component of our financial markets. The course will focus on the basic economics of real estate markets, market analysis, and real estate finance. Concepts used in the real estate industry will be covered throughout the course. The course will specifically consider market analysis, valuation, capital structure, and risk analyses for income-producing (commercial) properties. The securitization of both commercial and residential properties has been a critical factor in our current economy, and the structure of real estate securities and investment vehicles such as real estate investment trusts will be studied. The course also introduces real estate development and current trends in the market.

FIN 450. INVESTMENT MANAGEMENT AND TRADING STRATEGIES

This course serves as a practical project-based experience for the MBA students concentrating in finance. Students work in self-selected teams on a finance-themed project topic of their own choosing. The project requires application of significant analytic techniques and data wrangling. Oral and written communication of the interim and final project results are also key components. The projects provide valuable content for job interviews and other career-based conversations, and the project work is guided with that in mind. Numerous examples of past completed projects are provided.

*FIN 462. FOUNDATIONS IN FINANCIAL ECONOMICS

This course serves as an introduction to the theory and practice of corporate finance. It provides a market-oriented framework for analyzing the investment and financing decisions made by corporations. The two major questions, which this course aims to answer, are: 1) How do corporate managers decide which projects to undertake?; and 2) How do they decide how to finance these projects? Topics discussed include valuation of financial assets, capital budgeting techniques, theories of capital structure, and capital market efficiency.

*FIN 465 A/B. APPLIED FINANCE PROJECT I & II

3 credits

The experience of working on actual projects provides the opportunity for the student to incorporate subjects, skills and tools, introduced through the classroom, into the problem identification, assessment, and solution process used with and for clients. The project work also provides visibility and use of measurement schemes, statistical analysis, and engages the student in activity that supports the development and use of business judgment; skills and perspective driven by practice, with consequences associated with results - as they hear frequently in the courses they take. The projects offer visibility to varied management processes, internal and external political processes, and continually provides emphasis on measurable results - not simply activity. This course integrates and expands classroom education with 'real-world' experience - providing opportunities for, among other things;

project management; process management; task planning; testing and use of class concepts/tools in an actual work environment; focus on results, not simply activity, business planning; performance planning and management; inter/intra group collaborative efforts on goal-oriented work activity; business assessment; development/practice/testing of business judgment; organizational and functional assessments, management and personnel assessment; time management; measurements of 'value-added' and 'effectiveness' in consultative roles in widely-varied organizations; goal, task, and process negotiations; expectation development and communication; feedback development; and planning and coaching through change processes.

*FIN 478. INTRODUCTION TO AI AND FINANCE

FIN478 covers the application of generative AI technologies across diverse business contexts. The course will help you understand how to integrate Generative AI into today's business workflows, providing frameworks to decide when and how to use it effectively. You'll gain hands-on experience designing Generative AI tools to create business value and programming basic LLM-driven applications in Python. Finally, the course will ask you to become conversant with the big questions about Generative AI, to debate the moral, philosophical, and ethical challenges inherent in these systems and technologies.

MS Prerequisites: (GBA 462 or GBA 471), (GBA 464 or GBA 465 or GBA 485A)

PHD COURSES

FIN 505. THEORY OF FINANCE

4 credits

This course provides an introduction to financial economics. Its main objective is to rigorously develop the foundations of modern finance theory regarding asset pricing and financial markets. The topics include arbitrage asset pricing, optimal consumption-portfolio choices, static equilibrium models of asset pricing, asymmetric information, and dynamic modeling. The course prepares students for further study of asset pricing theories, corporate finance and econometric work in finance. The course is designed for first-year PhD students in finance, and assumes familiarity with basic microeconomics and macroeconomics.

FIN 511. CONTINUOUS TIME THEORY IN FINANCE

3 credits

The course builds on the basic theory presented in FIN 505 Theory of Finance. FIN 511 will emphasize some relatively advanced mathematical methods that are used in the research literature of financial economics. The objective of the course is to provide the student with enough knowledge of these methods that he or she can begin to use them in nontrivial ways in his or her research. Particular emphasis is given to topics that are costly or difficult to learn on an individual basis.

The methods surveyed in the course are primarily techniques for constructing and analyzing continuous-time models of trading and of stochastic asset price behavior. Virtually all of the derivative security pricing models and many of the multifactor models of asset prices and the term structure of interest rates are of this type.

FIN 512. EMPIRICAL ASSET PRICING

3 credits

This course covers classic contributions and recent developments in capital markets research, both applied theoretical and empirical, in relation to corporate policies, business cycle and economic growth. Specific topics include time-series predictability of stock market returns, empirical methods and evidence on the cross-section of returns, evidence on mutual fund performance and the closed-end fund puzzle, event studies and the empirical relations between stock returns and corporate policies, consumption-based asset pricing, applied equilibrium modeling of asset pricing anomalies and behavioral finance.

FIN 513. AGENCY THEORY

The course studies game-theoretic foundations of the theory of the firm. The strong emphasis is placed on corporate finance. The topics include capital structure, asymmetric information and signaling, contract design, and optimal security design. We also look into information aggregation in financial markets, bargaining with asymmetric information, and dynamic signaling – important and fascinating topics in the broader area of information economics and their applications to finance.

FIN 514. EMPIRICAL CORPORATE

This course covers cross-sectional and panel data empirical methods used in corporate finance research. The course will expose students to a variety of methods commonly employed in empirical research. While the course will cover the efficiency and consistency of various estimators, the primary focus will be on how econometric tools can be used to identify unbiased causal effects. Lectures and econometric readings will provide students with econometric intuition behind each method covered in the course. Course readings will expose students to examples of the methods being used in published and working papers. Assignments will familiarize students with standard datasets used in corporate finance and will enable students to apply the methods covered in the course and to analyze and criticize other researchers' use of common empirical methods.

FIN 522. ADVANCED EMPIRICAL ASSET PRICING

This course covers the methods and facts of asset pricing. Although theories are covered when necessary, the course is meant to be empirical in nature. The course starts with time-series and quickly moves to the cross-section. It will start with consumption- and production-based asset pricing. Then will move to recent developments in intermediary and behavioral asset pricing. The course will also cover alternative asset classes such as currency and commodity. The objective of the course is to get you up-to-date of the cutting edge empirical asset pricing research

FIN 523. ADVANCED AGENCY THEORY

The course studies dynamic aspects of the theory of the firm. The strong emphasis is placed on the role of time and repeated decisions in firm management. The topics include real options, dynamic lemons markets, dynamic contracts, and investment under constraints. The course is research intensive, requiring completion of several referee reports and a term project.

FIN 525. MACRO-FINANCE

3 credits

This course covers a range of topics at the nexus of finance and macroeconomics. The analysis flows from two key interrelated elements: frictions within

financial markets and household/firm heterogeneity. We shall see how these two forces work together to affect the determination of financial market outcomes and to shape the impact of monetary/fiscal policy interventions.

■ GENERAL BUSINESS ADMINISTRATION

Michael Raith, Area Coordinator

MASTERS LEVEL COURSES

GBA 400. INTRODUCTION TO PROBABILITY FOR FINANCE

0 credits

This three-lecture module provide students with an introduction to probability and statistics, aimed at facilitating better business decisions-making and a more effective use of information. We start with the core building blocks of probability, random variables and distributions. We next discuss measures of centrality and dispersion, along with their applications to key notions of risk and return. We then turn to methods for capturing relationships between variables, the centrality and dispersion of sums of variables, and, ultimately, how these measures can be used to assess the performance of portfolios, quantify downside risk, and measure the cost of capital. Students will use many of these concepts immediately in FIN 402 and then build upon and expand them in GBA 412.

GBA 401. STRUCTURED PROBLEM SOLVING

1 credit

Problem solving is one of the most important competencies at all levels of management and an essential skill for just about all post-MBA careers. This course introduces a high-level problem solving methodology used by top management consulting firms that can be adapted to a wide range of challenges encountered in business. The methodology provides a thoughtful process for bringing structure to ambiguous situations as well as for bringing your creativity and growing business knowledge to bear on real world problems. The key learning objectives are to develop your ability to (a) frame and scope a wide range of business related problems, (b) structure efficient data gathering and analysis, (c) ensure effective teamwork during the process, and (d) logically communicate actionable recommendations.

GBA 407. DIGITAL TRANSFORMATION STRATEGY

.5 credit

This course will provide a strategy framework centered around the seven action fields of digital transformation. It will enable participants to identify digital opportunities in their company through strategy workshops in a lean methodology and to build a digital roadmap. All participants will have access to a toolkit with templates, checklists and examples to fast-track their digital roadmap development.

With many practice examples provided throughout the course, participants will quickly gain an understanding of all relevant topics and components of a digital roadmap. Numerous established management frameworks will be adapted to the challenges and opportunities of the digital age. As part of the course, participants will be able to complete a draft digital transformation roadmap – and have a methodology and tools to immediately kick-start their own digital strategy workshop.

GBA 408. POLITICS, POLICY, AND STRATEGY

.5 credit

In an era of political volatility, effective management means looking beyond markets. This mini-course introduces the concept of a nonmarket environment: a world of regulation, legislation, and public perception where firms and other interests compete. Across three interactive sessions, participants will explore how companies use lobbying, coalition building, and other tools to develop strategies for managing beyond markets—even turning it to their strategic advantage.

GBA 409. GENERATIVE AI IN PRACTICE

.5 credit

Learn to harness the practical power of Generative AI and apply it directly to your role, no matter what field you're in. Through hands-on practice, you'll learn to use, design, and build Generative AI tools to create immediate value, gaining practical strategies to integrate AI into your workflows to make smarter, faster decisions. You'll explore the big questions surrounding AI -- the moral, philosophical, and ethical challenges inherent in this new frontier. From beginner to expert, this course will strengthen your GenAI skills and empower you to use AI tools confidently in your tasks.

*GBA 411. BUSINESS MODELING

This course has two major objectives: to develop your ability to frame business decision problems in a way that makes them amenable to quantitative analysis, and to train you in some fundamental techniques useful for analyzing and solving these problems. The course draws on three toolkits: 1. Spreadsheets to model business problems. 2. Optimization techniques to solve complex decision problems involving many variables and constraints. 3. Monte Carlo simulation for understanding and analyzing uncertainty. Examples from different functional areas will demonstrate how the techniques taught can be applied in a practical way to a variety of settings.

Recommended: GBA 412 or GBA 462

*GBA 412. DATA ANALYTICS

This course provides an introduction to utilizing data and data analytics to inform decision-making. Extracting information from data has become an integral part of modern business management, from Main Street to Wall Street to Silicon Valley. GBA 412 will de-mystify statistics, enabling students to thrive in a competitive market for data-based decision-making. After building core statistical and decision theoretic tools, this course will introduce you to different types of data and provide you with a set of analytical methods that apply to each. We review the basic notions of probability and randomness, transition to data visualization techniques, and then present the basis of modern data science: prediction and multiple regression methods. We will use a hands-on approach to data analysis (laptop computers are required for every class). In the process, students learn to ask the right questions, seek out the relevant data, and apply appropriate methods.

GBA 419A/B. LEADING TEAMS I & II

1 credit each

This sequence of courses spans fall and winter terms and prepares Simon MBA Coaches and Workshop leaders to lead 1st project teams and problem solving groups in areas of setting expectations; establishing process; employing collaborative problem-solving frameworks; managing conflict; and giving and receiving performance feedback. The course rests

on theoretical frameworks from the fields of education, psychology, and communication; its focus is the practical application of these concepts to facilitate the successful functioning of team-based problem solving and project management groups. The course provides weekly opportunity to review Workshop and Coach meeting related issues. Workshop leaders increase their mastery of business modeling and operations management concepts, and coaches improve their skills in developing presentations, managing projects and giving feedback for improved performance.

Prerequisite: Permission of the Instructor

*GBA 424. ANALYTICS DESIGN & APPLICATIONS

The course centers around four key questions that need to be answered to design effective analytics that solve managerial problems:

1) What analysis can support or be used to make the managerial decision?

2) What information do you need to conduct that analysis?

3) How do you get that information?

4) How do you present this analysis to communicate the key insights or conclusions?

The course will introduce and apply frameworks related to answering these questions. The course will use a series of real-world cases and examples involving managerial decisions to connect analytics to real world problems. These cases will take the students through an active learning process that builds on and extends the skills and knowledge gained in previous courses. The course focuses heavily on "soft" skills related to structuring complex problems, decision-making with imperfect information, and designing analysis to address analytics research questions. The course also reinforces and expands on "hard" skills related to data wrangling, programming, descriptive, predictive, and causal analytics, as well as introducing some unsupervised learning methods. The course will leverage software tools such as sql, Python, and Tableau.

MBA Prerequisite: GBA 412, GBA485A

MS Prerequisite: GBA 462, (GBA464 or GBA485A)

GBA 435. NEGOTIATION THEORY & PRACTICE: BARGAINING FOR VALUE

(Same as ENT435)

The course is subtitled "Bargaining for Value" because the notion of "bargaining" implies interaction and communication among self-interested players of diverse backgrounds and styles. "Bargaining for value" implies that the quantum of value extracted in a deal may vary within a range of potential values. "Negotiation" is a commonly-accepted term that captures the essence of these processes in a competitive or cooperative environment. This course surveys the theoretical and behavioral underpinnings of negotiation practices and develops skills that enhance the ability to capture value in cooperative and competitive bargaining scenarios.

*GBA 436. CAUSAL AND PREDICTIVE ANALYTICS

Businesses now gather data on their customers, competitors, and marketplace on an unprecedented scale. Simultaneously, the adoption of machine learning has made the cost of estimating sophisticated predictive models cheaper than ever. As the cost of making predictions has decreased, the need for decision-makers who can critically examine these analyses has increased. This is because implementations of sophisticated machine learning methods can lead to dramatically incorrect decisions and inferences if decision-makers do not correctly link their statistical models to the business context and the problem at hand.

This course is fundamentally about how to learn from data. We will demonstrate the stark differences in the goals and implementations of descriptive, predictive, and causal analysis. Students will be expanding their analytic toolkit in each of these areas and learning how to select the right tool for the job. Particular attention will be paid to the usage of these analysis to drive business decisions, and how to respond to data analytics questions in job interviews.

This course emphasizes a hands-on approach. We will apply data analysis in six unique cases and four assignments which span a wide variety of topics and feature real world data. The course uses the R programming language and RStudio. While some background in R is helpful, materials are provided for those who are new to the language or need a refresher.

The ultimate objective of this class is to prepare you to be a producer and consumer of data analytics, and to enhance your ability to correctly utilize data when making business decisions. Whether working with data directly or communicating with people who do, these skills are essential for the more sophisticated and successful business decision-maker.

MBA Prerequisite: GBA 412

MS Prerequisite: GBA 462

*GBA 436R. PREDICTIVE AND CAUSAL ANALYTICS IN R

Businesses now gather data on their customers, competitors, and marketplace on an unprecedented scale. Simultaneously, the adoption of machine learning has made the cost of estimating sophisticated predictive models cheaper than ever. As the cost of making predictions has decreased, the need for decision-makers who can critically examine these analyses has increased. This is because implementations of sophisticated machine learning methods can lead to dramatically incorrect decisions and inferences if decision-makers do not correctly link their statistical models to the business context and the problem at hand.

This course is fundamentally about how to learn from data. We will demonstrate the stark differences in the goals and implementations of descriptive, predictive, and causal analysis. Students will be expanding their analytic toolkit in each of these areas and learning how to select the right tool for the job. Particular attention will be paid to the usage of these analysis to drive business decisions, and how to respond to data analytics questions in job interviews.

This course emphasizes a hands-on approach. We will apply data analysis in six unique cases and four assignments which span a wide variety of topics and feature real world data. The course uses the R programming language and RStudio.

The ultimate objective of this class is to prepare you to be a producer and consumer of data analytics, and to enhance your ability to correctly utilize data when making business decisions. Whether working with data directly or communicating with people who do, these skills are essential for the more sophisticated and successful business decision-maker.

MBA Prerequisite: GBA 412

MS Prerequisite: GBA 462

GBA 439. ELEMENTS OF LEADERSHIP

This course approaches leadership as a set of learned skills that are subject to personal intention and choice. The focus is on cultivating core leadership mindsets and capacities: sense-making amid multiple perspectives, setting a vision, relating to others, and inventing solutions. These capacities are especially useful in team-oriented work settings and in situations where one must influence without authority. The course draws on contemporary theories of adult development and leadership, such as leader-member exchange and the philosophy of servant leadership. The intention is to prepare Simon graduates for the challenges they will face a few years out of school as they transition to roles where leadership and greater complexity come to the fore. Assignments will blend conceptual models and practice, leading to a personal philosophy of leadership and an agenda for continued development.

GBA 441. BUSINESS ETHICS & CORPORATE SOCIAL RESPONSIBILITY

This course deals with business ethics and the social responsibility of business organizations. Through class discussions and case studies, students explore the theory and practice of business ethics and develop their ability to recognize and address ethical issues. The course equips students with analytical skills in ethical reasoning and provides them with a substantive framework to deal with ethical challenges they are likely to encounter in their careers. Topics include corporate responsibilities vis-à-vis employees, customers, and society; insider trading; discrimination in employment and in the sharing economy; advertising and sales tactics; ethics in pricing; bribery; executive pay; intellectual property in the pharmaceutical industry; censorship; health care resource allocation; and environmental responsibilities.

GBA 444. ETHICS AND POLICY IN TECH

Tech firms—from start-ups to industry leaders—face a range of ethical and policy challenges. Start-ups may face barriers to entry or regulations ill-suited to their innovation. Industry leaders must consider antitrust considerations if they dominate a market. Moreover, tech firms of all sizes face ethical quandaries on issues related to AI. This course helps students to think systematically about regulatory and ethical issues surrounding AI. For instance, should guardrails be placed on AI usage; and, if so, who should determine the guardrails?

This course focuses on the skills needed to consider the policy and ethical environments of tech firms, and how these connect with firms' market environments. The tools developed in the course will also be applicable to the analysis of other types of firms.

*GBA 462P. CORE STATISTICS FOR MS STUDENTS USING PYTHON

This course equips MS students with statistical skills necessary for data-driven decision making. The course covers central tendency and variability, probability, binomial and normal distributions, standard scores, hypothesis testing, z and t tests, ANOVA, correlation and regression, and non-parametric tests.

GBA 463. ECONOMICS AND MARKETING STRATEGY FOR MS STUDENTS

This course introduces students to the basics of economics and marketing strategy through interactive lectures and case discussions. Consumer choice, demand curves, the impact of competition and costs form the nucleus of the economics topics. Marketing strategy builds on these consumer, competition and company considerations to understand the segmentation, targeting, positioning and promotional decisions of the firm.

*GBA 464. PROGRAMMING FOR ANALYTICS

This course provides a foundation in programming within the Python environment. Traditional programming concepts (operators, data structures, control structures, repetition, and user-defined functions) will be central to the learning objectives, but the concepts will be taught in the context of marketing and business analytics problems related to data management and visualization. In addition to high-level programming, the students will gain a foundational understanding of how data are organized and pulled from databases, including the querying process that turns raw data into the kinds of datasets that more advanced analytics tools leverage. The course involves hands-on tutorial assignments with practical pattern matching as well as less structured programming assignments, where the students are expected to write their own programs.

*GBA 465. INTRO TO PYTHON PROGRAMMING

Created in 1989, Python is one of the most popular programming languages in the world - attributable to its power, simplicity, and flexibility. Data analysts of all kinds (including business and marketing analysts, data scientists, management consultants, and product managers) can use Python - in combination with powerful, third-party packages including NumPy, Pandas, Matplotlib, and Seaborn - to import, explore, manipulate, analyze, and visualize data. By completing this course, you will be able to think like a programmer (with the practiced ability to break down complex problems into a series of smaller steps and pseudocode), write basic computer programs using Python (to implement your pseudocode and achieve your desired outcomes), and perform basic data analytics using Python (to import, explore, manipulate, analyze, and visualize data).

GBA 466. ACCOUNTING AND FINANCE FOR MS STUDENTS

This course presents the basics of financial accounting, and will provide a framework for analyzing financial data. The course begins with an overview of the four financial statements, and the accounting underlying those statements, and includes ratio analysis based on those statements. The course will then survey topics in corporate finance, centered on the analysis of financial data. The course includes a survey of financial metrics used to analyze operations, then proceeds to a discussion of project evaluation with a focus on relevant cash flows, and then investigates the appropriate required rate of return to be used in evaluating those cash flows. The course also covers methods for estimating firm value, and includes an overview of options and futures.

*GBA 468P. PRESCRIPTIVE ANALYTICS WITH PYTHON

GBA468 expands and develops the students' analytical tool kit to include prescriptive analytics methodologies for managerial decision-making. The coursework follows the FACt approach to business problem solving and will cover diverse applications in operational management, supply chain analytics, marketing and finance. Modeling techniques covered include: decision tree models, constrained optimization models and Monte Carlo simulation. The course will be taught primarily using Python.

*GBA 468R. PRESCRIPTIVE ANALYTICS WITH R

GBA468 expands and develops the students' analytical tool kit to include prescriptive analytics methodologies for managerial decision-making. The coursework follows the FACt approach to business problem solving and will cover diverse applications in operational management, supply chain analytics, marketing and finance. Modeling techniques covered include: decision tree models, constrained optimization models and Monte Carlo simulation. The course will be taught primarily using R.

*GBA 471. PROBABILITY AND DESCRIPTIVE ANALYTICS

A key goal of GBA471 is to generate insights from data to support business decision making. This course introduces basic techniques for data exploration and visualization, with an emphasis on understanding and reasoning with data and communicating data-driven results to a managerial audience. The course further covers the fundamental concepts in probability and inferential statistics necessary for understanding model building, and the use of data in decision making. Generative AI will be used to uncover conjectures for further exploration of data sets and augment attainable insights from data. Students will use Microsoft Excel and be introduced to Python for data analysis and graphing.

*GBA 472. CAUSAL AND PREDICTIVE ANALYTICS

This course introduces utilizing data and data analytics to inform decision-making in today's business environment. Extracting information from data has become an integral part of modern business management, from Main Street to Wall Street to Silicon Valley. This course will de-mystify statistical learning and data analytics, enabling students to thrive in a competitive market for data-based decision-making.

*GBA 473. DATA-DRIVEN DECISION MAKING

The objectives of this course are to understand the analytics environment, including people and organizational challenges, data, and the role of models, and to understand concepts and apply frameworks of data-driven decision-making for business decisions. GBA 473 covers marketing analytics, operational analytics, and business analytics. Generative AI is used throughout the course to enhance the process of discovery and the articulation of ideas. Learning to apply analytics design concepts for decision-oriented projects and pushing through systematized dashboards within the organization are key components of the course.

*GBA 474. ADVANCED ANALYTICS-DRIVEN DECISIONS

GBA474 covers the concepts and tools needed for the effective design of analytics, using non-system data and experiments to solve business problems. The course extends on the skills developed in previous coursework, in the use of predictive, causal, and prescriptive analytics techniques in managerial decision-making. Following the frame-analyze-communicate approach to business problem solving, the course covers applications in operations management, supply chain analytics, marketing, and finance.

GBA 474 focuses on "soft" skills related to structuring complex problems, decision-making with imperfect information, and designing analysis to address analytics research questions. It further reinforces and expands on "hard" skills related to data wrangling, descriptive, predictive, and causal analytics, unsupervised learning methods, and generative AI tools and applications.

Assignments are in the form of cases, which provide structured and unstructured practice opportunities for the full cycle of an analytics design project.

*GBA 475P. ONLINE BUSINESS ANALYTICS CAPSTONE PROJECT

In GBA 475P, you will combine your applied technical, analytics, and AI knowledge, your business decision-making skills, and your ability to communicate to both technical and non-technical audiences to solve a real-world business problem through a capstone project. You are encouraged to brainstorm project ideas from real-world data based on your professional work experience or academic interests. You may choose to attempt the project solo or to build a project team from your fellow cohort members based on shared interests. The capstone project serves as a final, cumulative demonstration of achieving the program goal and learning objectives for your MS in Business Analytics and Applied AI degree. It marks the culmination of your degree program.

GBA 476. ORGANIZATIONAL IMPACT USING ANALYTICS

GBA 476 prepares students to understand and utilize the best practices of storytelling using rhetoric, persuasion, influence strategy, analytics, data visualization, and Generative AI. Apply frameworks to convey business material to a variety of audiences, using standard office applications, data visualization platforms, and the latest Generative AI tools and techniques. Learn to apply storytelling concepts to connect information to insights, improving your ability to express your thinking and influence.

*GBA 478. INTRODUCTION TO AI AND BUSINESS

GBA478 covers the application of generative AI technologies across diverse business contexts. The course will help you understand how to integrate Generative AI into today's business workflows, providing frameworks to decide when and how to use it effectively. You'll gain hands-on experience designing Generative AI tools to create business value and programming basic LLM-driven applications in Python. Finally, the course will ask you to become conversant with the big questions about Generative AI, to debate the moral, philosophical, and ethical challenges inherent in these systems and technologies.

MS Prerequisites: (GBA 462 or GBA 471), (GBA 464 or GBA 465 or GBA 485A)

*GBA 479. GENERATIVE AI AND BUSINESS APPLICATIONS

This course covers the design and development of Generative AI-enhanced business applications. We will discuss a framework for integrating Gen AI tools and capabilities into business processes, tasks and workflows. Students will learn how to program with Gen AI tools and LLMs using Python and APIs, build Gen AI-driven systems that execute dynamic tasks, and develop multi-agent architectures for complex workflows. The course also covers the use of Retrieval-Augmented Generation (RAG) to access private knowledge bases built on organizational data. By the end of the course, students will be equipped with the technical and conceptual skills to design and build generative AI applications tailored to modern business needs.

GBA 484A/B. SIMON SCHOOL VENTURE FUND PRACTICUM FOR ANALYSTS/MANAGEMENT

GBA484A - 1 credit; GBA484B - 2 credits

The SSVF provides an environment where students can practice applying theories and skills acquired throughout the MBA and MS curricula to such matters as venture capital fund operations; early-stage business analysis; deal structure; and funding considerations faced by startups seeking capital investments. Vehicles for applied learning include performing due diligence on startups seeking SSVF

investment and making thoughtful and well-reasoned investment recommendations to the SSVF Student Managers and Board; updating status and performance information for existing SSVF investments; participating in creating portfolio reports for SSVF stakeholders; participating as required in reporting and investment calls with the SSVF Board; and participating as required in approved investment closing procedures.

GBA 484A is a 1-credit practicum for MBA and MS students who are accepted by the Management Team of the Simon School Venture Fund (SSVF) as an analyst. Students receive 1 credit for successful participation as analysts, registering in Fall B and receiving a grade of Incomplete until their commitments to the Fund are completed in the following Spring.

Second-year MBA students who are accepted into the Management Team of the SSVF by the SSVF Board register in Fall A for GBA 484B, a 2-credit SSVF Practicum, receiving a grade of Incomplete until their Fund commitments are completed in the following Spring.

The purpose of these practicum courses is to recognize and support the effective analysis and portfolio management functions of the SSVF throughout the academic year. Instructor interaction with students is primarily advisory and ad hoc. Analysts primary contact, training, evaluation and performance coordinators will be the SSVF Student Management Team.

GBA 485A FOUNDATIONS OF PYTHON

This course introduces and provides a foundation for Python. Students will continue to build on their Python programming language skills throughout the MS Finance program.

GBA 490. AMERICAN BUSINESS PRACTICE

1 credit

This course is designed to give non-U.S. students an opportunity to apply business-management theories they have learned in their Simon School studies while they are assigned as interns (minimum of six weeks) with U.S. companies. Internships allow students to work in business settings/situations in which they receive on-the-job training from management personnel and gain valuable practical experience in performing professional-level tasks in their area(s) of concentration. GBA 490, which cannot be used to complete a concentration in the MBA program, is open only to non-U.S. students who are eligible to work in the United States. An eligible student, as defined by immigration regulations, is a degree candidate who has lawfully resided in the United States on visa status for at least one academic year (eight to nine months) prior to starting an internship position. Students who plan to enroll in GBA 490 must communicate with the University of Rochester's International Services Office (ISO) regarding the submission of proper documentation for employment. They should inform Simon School Career Management of their plans to seek a business internship, and they should schedule an appointment with Career Management to discuss career interests and employment-search strategies. When/if an internship is obtained, the student must meet with a GBA 490 faculty advisor to prepare a proposal describing the location and nature of the assignment and the planned functional area of study. The proposal, which will include specific learning objectives, must be approved by the faculty advisor prior to the student's acceptance of the internship. Upon completion of the internship assignment, the student must prepare a 10- to 12-page report detailing its outcome(s) and stating whether the proposed learning objectives were met.

Prerequisite: completion of all core courses

GBA 490E. INTEGRATING BUSINESS THEORY AND PRACTICE

Credit—one hour

This course is designed to give students an opportunity to apply business-management theories they have learned in their Simon School studies while they are assigned as unpaid interns. These unpaid internships allow students to work in business settings and situations in which they receive on-the-job training from management personnel and gain valuable practical experience in performing professional-level tasks in their area(s) of concentration.

GBA 491. READING COURSE

(Offered at the discretion of individual faculty)

Supervised reading and study on topics beyond those covered in existing formal courses.

PHD COURSES

GBA 548. BUSINESS FUNDAMENTALS EXAM

1 credit

This course can serve as the culminating experience for the Masters of Science in Business Fundamentals for some concentrations. This course involves intense independent preparation for the exam, including student-directed regular faculty interactions to receive guidance, clarifications, or additional practice problems. Two components of the course demark the culminating experience. First, the students take the preliminary exam for their intended concentration. Second, the students complete an oral exam for their intended concentration. If the student does sufficiently well enough on the written prelim exam, the oral exam can be waived.

GBA 549. BUSINESS FUNDAMENTALS PAPER

1 credit

This course is the culminating experience for the Masters of Science in Business Fundamentals for some concentrations. The culminating experience requires the students to produce a paper and present that paper. The course consists of contact with the faculty member(s) who are advising the student on this paper. The course involves significant directed or independent research activities and minimal, if any, classroom time. Through this process, students demonstrate their readiness to conduct research and their mastery of the masters-level content. The course will normally culminate in a research paper presentation in the weeks following submission of the paper.

GBA 579. MASTERS RESEARCH THESIS

This course is the culminating experience for the Masters of Science in Business Research program. The culminating experience requires the students to integrate their program content to address relevant theoretical and/or empirical issues in their field. This course involves an intense independent research and study as well as individualized faculty-student interactions to support this independent research. Through this process, students demonstrate their readiness to conduct original research and their mastery of related field courses at a PhD level. The course will normally require submission of a substantial original research paper along with an oral defense of that research paper.

GBA 595. PHD RESEARCH

GBA 999. WRITING DISSERTATION

■ HEALTH SCIENCES MANAGEMENT

Gerard J. Wedig, Area Coordinator

MASTERS LEVEL COURSES

*HSM 420. BUSINESS ECONOMICS OF THE HEALTH CARE INDUSTRY

HSM 420 uses the tools of managerial economics to analyze the business institutions, practices and regulation of the health care industry. The course covers the health care value chain including: i) purchasers of health care services (e.g., government, private insurers and employers); ii) providers of health care services (e.g., hospitals and physicians); and iii) manufacturers of medical devices, pharmaceuticals and supplies. Each unit of the course consists of an economic overview of the industry segment, including a review of the managerial economics issues that are currently important in the industry segment. Topics include the economic structure of the U.S. healthcare industry, including its vertical relations; placing the US healthcare system in international context and understanding the role that technology plays in driving long term change in the industry; the fiscal crises that beset Medicare and recent payment innovations that Medicare has made that may fundamentally change the organization and delivery of health care services; private health insurance in the U.S.; provider sector restructuring, both horizontally and vertically, to meet the challenges posed by population health and capitation; the evolution of managed care as embodied in Accountable Care Organizations and consumer driven health care; quality measurement and reward, disease management and pay-for-performance; management challenges of the pharmaceutical and medical device industries, including managing the flow of innovation and marketing and distributing new products; current trends in both the adoption of and payment for medical technology including cost-effectiveness analysis; and the likely effects of health care reform on the health economy.

HSM 425. MANAGERIAL ACCOUNTING FOR HEALTH CARE ORGANIZATIONS

(Same as ACC 445)

This course will introduce students to accounting concepts and then the focus of the course will shift into managerial accounting. Costs for health services continue to rise faster than overall economic growth drawing ever greater attention from employers, governments and consumers. The front line of the cost battle is within the health services entities where decision making depends on accurate reporting of internal costs. This course will allow the student to understand how costs are reported and how to use this information to make decisions within the health services entity. The following topics will be examined within a health services setting: cost allocation, cost-volume-profit analysis, budgeting and variance analysis, and transfer pricing.

HSM 430. HEALTH SCIENCES MANAGEMENT AND STRATEGY

(Same as STR 430)

This course applies the principles of organizational economics and strategy to the institutional setting of the health sciences. The course focuses on the interdependence between the delivery, financing, and technology sectors of the health care marketplace. It discusses how management and strategy choices within each sector are responses to the unique institutional factors in the health care marketplace and how the strategies of each sector affect the behavior of the others.

MBA Prerequisite: STR 401

HSM 437. MANAGING HEALTH CARE OPERATIONS

(Same as OMG 437)

The health care industry is undergoing rapid growth as well as rapid structural changes. New technology, changing reimbursement mechanisms, and increased competition create many interesting management problems, least of which in the area of health care operations. In this course, we will study the operations of various types of health care provider organizations (such as hospitals, HMO's, group practices, nursing homes, etc.) and other participants in the industry (such as insurance companies, pharmaceutical companies, suppliers and consulting companies). Topics that will be studied include: patient and provider scheduling, capacity management, providing services and supplies to health care providers, new product development and integrated delivery systems.

Students who took OMG 402 or similar need to obtain instructor's permission prior to registration.

HSM 440. EVOLVING MEDICAL MARKETS

Pharmaceutical and medical device firms create, produce, and market products that save lives and improve the quality of life for billions of people worldwide, with global sales revenue of approximately $2 trillion. This course is designed to help students understand and analyze the strategic decisions made by executives of pharmaceutical and medical device firms. The course assumes that students understand the fundamentals of economic analysis (e.g., minimum efficient scale, Bertrand Trap, etc.) and are at least familiar with common frameworks for strategic analysis (e.g., Porter's Five Forces). We will build on that foundation by understanding issues specific to this industry such as regulations and development costs and timelines to explore challenges facing industry executives and the strategic decisions they make in response.

HSM 451. HEALTH CARE MARKETING AND BUSINESS PLAN DEVELOPMENT

Basic marketing and economic concepts are integrated with the unique institutional features of health care markets to develop a framework for strategic and business planning for a health care organization. A special focus is placed on the practical elements of plan development.

HSM 452. HEALTH CARE ACCOUNTING AND FINANCE

Basic concepts in finance and financial accounting are combined with material developed in managerial accounting to develop a framework for financial planning, assessment and control and well as for financial valuation and decision making in health care organizations. The goal of the class is to provide students with a set of tools to first analyze financial condition and make and assess a viable strategic financial plan for a health care organization. In addition, students will be taught basic principles of financial valuation in order to make financial decisions about programmatic development. Course topics include: understanding the various sources of revenue for health care providers and the methodologies for computing them; analysis of the financial statements of nonprofit Medical Centers and other providers; analysis of the statement of cash flows to determine the financial sustainability of a strategic financial plan; use of projected sources and uses of funds to construct a simple strategic financial plan; description of

various Medical Center budgets and their relation to the strategic financial plan; methods of measuring budget variances and budget control; principles of financial valuation of an economic entity using a financial multi ple; discounted cash flow (DCF) valuation of an economic entity given relevant cash flows and risk parameters; analysis of capital investment opportunities in nonprofit organizations; construction of simple pro forma forecasts of financial statements and cash flows for an economic entity; analysis of the merger synergies and strategic issues behind health care mergers; mechanics behind a nonprofit merger; analysis of the strategic considerations of Medical Centers vertically integrating into the health insurance market; and simple valuations of medical practices.

MBA Prerequisites: HSM 425 or (ACC 401 or FIN 402)

HSM 454. LEADING HEALTH CARE ORGANIZATIONS

This course explores behavioral concepts including leadership, motivation, decision-making, communication, group dynamics, culture, and change management in the context of healthcare organizational and individual performance and engagement. Students systematically analyze healthcare organizational behavior issues and propose solutions that improve healthcare outcomes.

HSM 455. HEALTH CARE PRACTICUM I

This course provides students with hands-on experience with a medical management project. It develops skills in identifying a problem, working with data, finding possible solutions and delivering recommendations, all within a fixed time frame. Students learn to produce analysis, but also have to argue persuasively that the recommendations based on the analysis are valuable and should be implemented. Projects require that students not only apply analyses learned in the classroom, but also that they argue persuasively that the recommendations based on the analyses are valuable and should be implemented. Teams of three to four students are responsible for the individual projects, and meet with the instructor individually. The organizations submitting projects must be willing to spend time with students and to provide appropriate data.

HSM 456. HEALTH CARE PRACTICUM II

3 credits

A continuation of the project from HSM 455.

MBA Prerequisite: HSM 455

HSM 464. HEALTH IT AND AI

The course explores the transformative role of information technology and artificialintelligence in contemporary healthcare. It offers a strategic and practical overview of emerging digital tools and AI applications that enhance patient care, streamline clinical workflows, and support data-driven decision-making. We also explore how AI can serve as a collaborative partner in problem-solving – helping explore complex problems, uncovering underlying issues and patterns in data, and developing innovative solutions. The course complements this focus on technology with process/quality improvement methods and systems thinking approaches to analyze problems, identify root causes, and develop effective solutions to problems in healthcare.

HSM 465. HEALTH CARE DATA VISUALIZATION AND ANALYTICS

The focus of the course is on learning to get insights from healthcare datasets. An important component of the course learning will be a term-long project. Tableau will be taught as a data visualization tool, and you will learn to clean a dataset, interactively analyze a dataset, visualize insights, and build dashboards. Related topics will also be covered including database design and data literacy.

■INFORMATION SYSTEMS AND TECHNOLOGY

Yaron Shaposhnik, Area Coordinator

MASTERS LEVEL COURSES

*CIS 401 INFORMATION SYSTEMS FOR MANAGEMENT

Information technology is transforming firms, markets, products, and processes with remarkable speed. Recent developments in AI have the potential to further accelerate the transformation. This presents managers with new challenges and valuable opportunities. This course dives into the strategic use of information technology within a business context, focusing on how it can enable competitive advantage, enhance business processes, and drive innovation. The course introduces a number of useful frameworks for analyzing the use of information technology and AI in organizations and includes some exposure to database and data visualization tools. The strategic and economic impacts of information technology are emphasized. The course is designed with line and senior managers in mind, as opposed to the managers of the IS function.

*CIS 413. MANAGING DIGITAL PRODUCTS & PLATFORMS

This course draws on a mix of concepts from economics and technology to frame and understand issues relating to the management of digital products, services, and platforms. It is targeted at students who wish to pursue product management or similar roles in technology firms, or in firms that invest in technology companies. The course focuses on the interconnections between technology, business models, and user experience. Topics covered include the economics of digital products, innovation, platform architecture, design, revenue models, and growth.

MBA Prerequisite: CIS 401

*CIS 415. BUSINESS PROCESS ANALYSIS AND DESIGN

Managers in many business functions are responsible for how work is performed in their units and for how critical activities are coordinated across the organization and beyond. Thus, a solid understanding of how to ensure both effectiveness and efficiency through well-designed process is invaluable for managers and the consultant who support them. This course explores how to go about designing business processes or redesigning those no longer fit for purpose due to changes in customer needs or the competitive/technological landscapes. Key themes include:

1. Understanding how organizations deliver value through processes.

2. Focusing (re)design efforts where they will have the most impact on organizational goals.

3. Mapping existing processes and identifying weaknesses.

4. Redesigning processes utilizing a range of techniques and heuristics.

5. Implementing the new process using appropriate technologies and training.

6. Exploring how new artificial intelligence (AI) technologies change how work is done and how processes are designed.

A comprehensive project allows students to explore these themes in a team-based field project involving a real business process.

MBA Prerequisite: CIS 401

*CIS 417. INTRODUCTION TO BUSINESS ANALYTICS

This course focuses on how analytics can support/improve business operations. It covers the fundamental principles and techniques of business analytics, in particular supervised and unsupervised machine learning methods, and uses real world examples and cases to illustrate these. The objective is to train students to approach business problems data-analytically—translate business problems into one or more related analytic problems; identify the appropriate techniques to solve these problems; and critically evaluate the results and their impact on business performance. The material will be presented in an intuitive manner, with the goal of making students intelligent consumers of these widely applicable techniques. However, hands-on learning using appropriate software is required to achieve sufficient mastery of the material.

MBA Prerequisite: GBA 412

*CIS 431. BIG DATA

This class offers an introduction to big data concepts, environments, processes, and tools from the perspective of data analysts and data scientists. The course sets the scene for the emergence of big data as an important trend in the business world and explain the technical architectures that make analyzing data at scale possible. The hands-on portion of the class focuses on the major tools of the Hadoop big data ecosystem such as HDFS, Hive, Zeppelin, Spark and Spark MLlib. In addition, students gain a broad understanding of the role of MapReduce, Tez, Impala, YARN, and other big data technologies. Students use a live Hadoop cluster hosted on Amazon Web Services (AWS) and thus also have an opportunity to understand the characteristics of cloud computing and storage solutions and their growing role in big data analytics.

MBA Prerequisites: GBA 412, GBA 485A

MS Prerequisites: GBA 462, (GBA464 or GBA485A)

*CIS 432 MACHINE LEARNING FOR BUSINESS ANALYTICS

This course aims to train practitioners of analytics methods to construct, evaluate, and apply machine learning (ML) models in a variety of business applications using modern tools. The course covers programming tools for handling data, computational frameworks, cloud platforms, and an array of advanced ML algorithms. The course emphasizes hands-on work through class exercises, homework assignments, and projects. The course is self-contained, but basic programming skills are required.

MBA Prerequisites: GBA 412, GBA 485A

MS Prerequisites: GBA 462, (GBA464 or GBA485A)

*CIS 433. AI AND DEEP LEARNING

Artificial intelligence (AI) was born in the middle of the 20th century as a branch of computer science. The early approach of symbolic AI has now been largely supplanted by machine learning. The recent breakthrough in artificial neural network, rebranded as deep learning, represents the state-of-the-art of machine learning in many tasks, including computer vision and natural language processing. This has in turn triggered an unprecedented enthusiasm and huge investment in AI in the business world as well as in society at large. This course introduces the field of AI to business students with a particular emphasis on deep learning which is driving the current AI revolution. The course consists of three modules. The first module establishes the foundation of AI and deep learning. The second module introduces major neural network architectures widely used in practice. The third module touches on generative AI which is particularly promising in recent years. The course emphasizes experiential learning and contains many hands-on projects using TensorFlow broadly and Keras in particular. Specific learning objectives include

1. Learn the fundamentals of deep learning, including its origin, theory, and training techniques.

2. Learn the modern network architectures including dense network, convolutional network,

recurrent network, and transformer.

3. Learn major algorithms of generative AI such as variational autoencoder, generative

adversarial network, and diffusion models.

4. Learn TensorFlow Data API

5. Learn the three approaches of building models in Keras

6. Learn Conv2D layer to build convolutional network.

7. Learn LSTM and GRU layers to build recurrent neural network.

8. Learn the implementation of transformer.

9. Learn the implementation of variational autoencoder.

10. Learn the implementation of generative adversarial network.

11. Learn the implementation of denoising diffusion implicit model.

MBA Prerequisites: GBA 412, GBA 485A

MS Prerequisites: GBA 462, (GBA464 or GBA485A)

*CIS 434. SOCIAL MEDIA AND TEXT ANALYTICS

The rise of social media has empowered customers in an unprecedented way. They are well connected with each other through platforms like Facebook and Twitter, and they can easily express and distribute their comments, criticisms, or endorsements publicly to large audiences in real time. This fundamental media revolution not only forces companies to actively manage their presence and engage with customers on social media platforms but also offers them a golden opportunity to extract intelligence from the vast amount of unstructured data. Technology and strategies are increasingly intertwined in this new frontier of innovation and competition.

This course draws on a unique blend of social media strategies and the rapidly evolving information technologies supporting these strategies. We will discuss issues related to the monitoring and analyzing of social media for companies in different industries. The learning objectives of this course include: (1) gaining a deeper understanding of social media and its implications in the business world; (2) becoming comfortable with text data; and (3) being able to understand and apply several commonly used methods to analyze text data.

MBA Prerequisites: GBA 412, GBA 485A

MS Prerequisites: GBA 462, (GBA464 or GBA485A)

*CIS 437. DIGITAL MARKETING STRATEGY

(Same as MKT 437)

This course examines the major issues

involved in marketing on the Internet. Among the topics studied are: new product opportunities on the Internet; the changed role of advertising; the Internet as a two-way communication medium with consumers; targeting individual consumers; word-of-mouth among consumers on the Internet; the Internet as a distribution channel; and marketing research on the Internet.

MBA Prerequisite: MKT 402

MS Prerequisite: GBA 463

*CIS 438. AGENTIC AI APPLICATION

This course introduces the basics of developing web-based AI and business analytics applications, with three objectives.

The primary objective is to prepare students for projects that require not only the analysis of data or the use of modern AI techniques, but also the creation of an efficient and fully functional user interfaces supporting many concurrent users.

The second objective is to pave the way for subsequent courses so that students can use what is taught in this course to create a front-end user interface for what they learn in other analytics courses.

The third objective is to help students develop a personal branding site showcasing their knowledge base and skill sets.

*CIS 446. FINANCIAL TECHNOLOGY

(Same as FIN 446)

This course provides an introduction to the evolving use of technology in financial markets and applications. One area of focus is "blockchain" technology in financial transactions, markets, permanent historical records and cryptocurrencies. The other major area of focus is innovations such as peer-to-peer transactions and the use of artificial intelligence in evaluating and funding investments. Throughout we will consider the prospects for the success of the new technologies, asking questions such as: How revolutionary are the various parts of Fintech? What are the hidden pitfalls of the technology/business models to individuals, companies and/or society? How will major financial institutions and governments react? What changes are required in legal rules (including internationally) to accommodate Fintech? The course will require working with large data sets (the blockchain) and specific cryptocurrency implementations. While computer programming skills are not required as a pre-requisite, success in the course will require that students learn the basics of the computer science concepts of public-key cryptography, data verification, and simple programming structures (loops, branching).

MBA Prerequisite: FIN 402

MS Prerequisite: FIN 462

*CIS 455. AI BUSINESS PROJECT

3 credits

This course provides MSAIB students with the opportunity to use the skills they have developed through other coursework in analytics and artificial intelligence to the development and execution of a capstone project. The projects, using real-world situations and data, will serve as preparation for careers in business analytics, particularly applying artificial intelligence and machine learning techniques to business applications.

CIS 461. STRATEGY AND BUSINESS SYSTEMS CONSULTING PRACTICUM

(Same as OMG 461 and STR 461)

3 credits

This course provides an introduction to strategy and business systems consulting. It is primarily aimed at those exploring career opportunities in consulting but will also help students become savvy consumers of consulting services. It includes a live project helping a client at a real organization answer an important question or achieve a significant business objective. Student teams work together to deliver a set of well-reasoned impactful recommendations based upon thoughtful analysis of the relevant facts. In this way students consolidate their understanding of the problem solving approaches introduced in GBA401 through experiential learning.

*CIS 465. BUSINESS ANALYTICS PROJECT

3 credits

This course provides MS and MBA students with the opportunity to use the skills they have developed through other coursework in statistics and analytics to the development and execution of a capstone project. The projects, using real-world situations and data, will serve as preparation for careers in industries such as marketing, consulting, and finance that require extensive knowledge and application of data science.

*CIS 467 DATA MANAGEMENT AND WAREHOUSING

This course focuses on database design, management, and warehousing concepts to support AI and analytics efforts. The course introduces ER diagrams, SQL programming and related frameworks for data retrieval and transformation as well some advanced SQL features such as user-defined functions, triggers and procedures.

*CIS 468 FINANCIAL SPREADSHEET MODELING

This course builds and refines students' analytical skillset through practical, hands-on experience with advanced spreadsheet-based tools for managerial decision-making. Students will conduct quantitative analyses of complex business problems using models that incorporate optimization, risk simulation, and sensitivity analysis. Emphasis is placed on applying quantitative methods to real-world scenarios and solving large-scale business challenges. Tools covered include spreadsheet optimization, simulation, and automation with VBA. Examples used in class will primarily be drawn from finance-related contexts, providing students with relevant exposure to modeling challenges in areas such as investment analysis, portfolio optimization, risk management, and financial forecasting. By the end of the course, students will have developed advanced, industry-relevant skills in business modeling and spreadsheet analysis.

PHD COURSES

CIS 511. RESEARCH TOPICS AND METHODS IN INFORMATION SYSTEMS

3 credits

This course introduces important research methods/topics for IS researchers, covering analytical modeling, causal inference, and machine learning.

For analytical modeling, we will discuss auction and mechanism design for information/computation goods.

For causal inference, we will establish the probabilistic foundation of commonly used methods such as DID, matching, IV, and regression discontinuity.

For machine learning, we will introduce the statistical learning theory, SVM, EM, MCMC, variational inference, and deep learning.

CIS 512. ADVANCED TOPICS IN INFORMATION SYSTEMS

3 credits

This course introduces students to research in Information Systems (IS). Multiple lectures will be dedicated to each topic, covering the necessary mathematical background, primary analysis techniques, and important, seminal, or recent papers. The course aims to attain the following objectives: learn about what constitutes research in IS, develop critical thinking about academic papers, familiarize students with new research areas, provide opportunity to think about new research problems, and practice constructing and delivering academic talks.

■ MANAGEMENT COMMUNICATION

Carol Shuherk, Area Coordinator

MGC 401. PROFESSIONAL COMMUNICATION: PERSUASION AND INFLUENCE

MGC 401 establishes the conceptual foundation and skill building method for the MGC sequence. It draws on classical principles of argument and persuasion and on current communication research that illuminates the ways influence is accomplished in business today. These theories are applied through business case analysis, self-assessment and experiential learning. Students develop performance skills through successive rounds of professional presentations, receiving individualized feedback on their work. The course objective is development of the communication skills key to success in any field, those required to adapt effectively to any given audience, and to express ideas with a fitting blend of logic and feeling.

MGC 402. INTERPERSONAL PERSUASION: INFLUENCE IN DYNAMIC INTERACTION

MGC 402 applies the core concepts of persuasion to five professional environments where communication takes place on teams and one-to-one: negotiations, change initiatives, conflict resolution, cultural diversity, and leadership with direct reports. It focuses on the dynamics between two or more people who are trying to influence one another, and teaches the communication skills required to succeed. The communication theories underlying the course are applied through case analysis, self-assessment, and business simulations that enable students to practice their ability to communicate persuasively in each of the five environments. The course culminates with development planning for improving communication competency as key to career success.

MGC 406. PROFESSIONAL COMMUNICATION: PERSUASION AND INFLUENCE

MGC 406 has a focused goal: to cultivate communication skills key to professional success. The conceptual foundation of the course is classical rhetoric. This offers a 5-dimension analytic framework for developing persuasive communication: methodical profiling of a given audience - their interests, viewpoints, and biases; systematic discovery of the presentation material salient to a given audience; strategic structuring of material as determined by persuasion goals; deliberative selection of language; and conscious management of verbal and nonverbal expression in delivery. Pre-class preparation, in-class workshops, and each assignment applies these analytic tools to contemporary business problems and the communication challenges class members face in their professional lives. The course develops students' conceptual understanding and practical skill in persuasive self-expression through successive rounds of professional presentations, receiving individualized feedback on their work.

MBA Prerequisite: FIN 402 (can be concurrent)

MGC 461. PROFESSIONAL COMMUNICATION

4 credits

MGC 461 is based on classical principles of argument and persuasion and current communication research that reveals the keys to having influence in a global business world. Its goal is to develop professional-level presentation skills, individually and in teams. The course is performance based; all class sessions require students to speak and interact extensively. Over two mini-semesters, students develop professional presentation skills through four individual and two team-based speaking assignments, for which they receive extensive, individualized feedback. They also learn a systematic process for assessing their own communication, and for giving feedback to others. At the end of the course students will have developed skills key to success in any field: the ability to adapt effectively to a given audience, and to express ideas with an appropriate combination of logic and feeling.

■ MANAGEMENT SCIENCE METHODS

Harry Groenevelt, Area Coordinator

MASTERS LEVEL COURSES

MSM 400. MATHEMATICS REVIEW

Non-credit

Review of mathematical concepts prerequisite to the MBA program. Topics include: sets, vectors and matrices, functions and relations, linear equations, laws of exponents, limits and continuity, differentiation, maxima-minima, partial derivatives and simple integration.

MSM 491. MATH FOR MANAGEMENT

2 credits

This is a master's level math class that is more intensive than MSM 400. Analysis and concepts in modern business analysis rely heavily on quantitative methods. Necessary theories and intuition behind them will be covered. The focus of the course is primarily on applications in business, economics and related areas.

PHD COURSES

MSM 502. LINEAR ALGEBRA

The goal of this course is to give an introduction to linear algebra. Topics include: Gaussian elimination, matrix operations, matrix inverses. Vector spaces and subspaces, linear independence, and the basis of a space. Row space and column space of a matrix, fundamental theorem of linear algebra, linear transformations. Orthogonal vectors and subspaces, orthogonal bases, and Gram-Schmidt method. Orthogonal projections, linear regression. Determinants: how to calculate them, properties, and applications. Calculating eigenvectors and eigenvalues, basic properties. Matrix diagonalization, application to difference equations and differential equations. Positive definite matrices, tests for positive definiteness, singular value decomposition. Classification of states, transience and recurrence, classes of states. Absorption, expected reward. Stationary and limiting distributions. Offered in the summer, primarily for entering doctoral students.

MSM 503. OPTIMIZATION

This course covers Optimization in Rn, Weierstrass Theorem, Unconstrained optimization, Lagrange Theorem and equality constraints, Kuhn-Tucker Theorem and Inequality constraints, Convexity, Parametric Monotonicity and Supermodularity. Offered in the summer, primarily for entering doctoral students.

MSM 506. STOCHASTIC PROCESSES: THEORY AND APPLICATIONS

3 credits

This is a graduate level course mostly on the theory of stochastic process but also on some of its modern applications. The course starts with a brief review of the measure-theoretic foundation of probability theory and the modern theory of conditional expectation/distribution/independence. Then, we dive into the general concepts and properties of (mostly discrete-time) stochastic processes which lays the foundation for more detailed studies of various types of stochastic processes encountered in business research. We will focus on the classical renewal theory and Markov chain theory. Towards the end, we unify them in the framework of Markov renewal theory. We will spend the last two weeks on Markov decision process and reinforcement learning.

MSM 511. ADVANCED TOPICS IN OPERATIONS MANAGEMENT

3 credits

This course introduces students to research in Operations Management (OM). Multiple lectures will be dedicated to each topic, covering the necessary mathematical background, primary analysis techniques, and important, seminal, or recent papers. The course aims to attain the following objectives: learn about what constitutes research in OM, develop critical thinking about academic papers, familiarize students with new research areas, provide opportunity to think about new research problems, and practice constructing and delivering academic talks.

MSM 512. OPERATIONS MANAGEMENT: BUSINESS PROBLEMS CONTEXT

3 credits

It is important for Operations Management PhDs to understand the research domain not only from the point of view of tools but also from the point of view of business problems that the field studies. In this class you will develop an understanding of how to manage the operational aspects of key business processes. We will explore the following topics: Process capacity analysis, Process Quality Control, Recourse requirements for service processes, Demand Forecasting, Inventory Management of input materials and finished products, Management of perishable inventory and Management of Supply Chains.

MSM 518. ADVANCED BUSINESS MODELING

3 credits

This course will train students in the effective use of spreadsheet based tools to solve business problems involving quantitative analysis. This course will provide additional practice in the predictive and prescriptive analytics tools including Monte Carlo simulation, sensitivity analysis, linear and nonlinear optimization, decision trees. In addition, students will be introduced to Visual Basic for applications, simulation optimization, dynamic programming.

MSM 522. OPTIMIZATION

3 credits

This is a foundational course in linear optimization/programming (LP). The tentative list of topics includes: applications of LPs, geometrical properties, algorithms for solving LPs, duality theory, sensitivity analysis, techniques for solving large scale LPs, and network flow problems.

Prerequisite: Some knowledge of linear algebra and functions of a real variable.

MSM 532. MACHINE LEARNING FOR BUSINESS ANALYTICS

3 credits

This course aims to train practitioners of analytics methods to construct, evaluate, and apply machine learning (ML) models in a variety of business applications using modern tools. The course covers programming tools for handling data, computational frameworks, cloud platforms, and an array of advanced ML algorithms. The course emphasizes hands-on work through class exercises, homework assignments, and projects. The course is self-contained, but basic programming skills are required. A part of this course will be dedicated to analytics research.

MSM 542. QUEUING THEORY AND APPLICATIONS

The course offers in-depth study of queues and networks of queues, including single- and multiserver-queues; Markovian models of phase-type systems; open-and-closed networks of queues; product-form solutions and local balance; bottleneck-analysis approximations and computational aspects. It also covers applications to scheduling, resource allocation and capacity-expansion decisions in service systems, computer systems and job shops.

Prerequisite: MSM 504, Medical School course BST 402, or permission of the instructor.

■ MARKETING

Paul Ellickson, Area Coordinator

MASTERS LEVEL COURSES

MKT 402. MARKETING MANAGEMENT

This course is our introduction to marketing management. The key objectives of the course are (1) to provide the student with a series of frameworks for identifying, analyzing, and solving marketing problems and (2) to enhance the student's ability to effectively communicate analyses and solutions. We first focus on understanding the three C's – customers, the company, and competitors. Based on this analysis, we develop a strategy for our product(s) and discuss how a marketing strategy can be implemented through the elements of the marketing mix: product design, pricing, advertising & promotion as well as channels of distribution.

The class sessions consist of classroom lectures and case study discussions. Rather than focusing on internalizing facts and institutional detail, the emphasis is on critical thinking and application of the fundamental marketing strategy principles to business situations at hand.

MBA Prerequisite: STR 401

MS Prerequisite: GBA 462

*MKT 412. MARKETING RESEARCH

This course deals with the collection and use of data to support marketing decisions. The first part of the course teaches the student how to formulate the research problem, design the research and collect the data. Among the data-collection techniques discussed are: questionnaire design; telephone, mail and electronic surveys; and laboratory and field experiments. The second part of the course examines various techniques for analyzing data: cross-classification analysis, factor

analysis, multidimensional scaling, conjoint analysis, etc. As part of the course requirements, teams of students design, administer, analyze and report on an actual marketing-research study.

Note: students who have taken MKT451 are not allowed to take MKT 412.

MBA Prerequisites: MKT 402, GBA 412

MS Prerequisite: GBA 462

MKT 413. APPLIED PRODUCT MANAGEMENT

Product Management requires outstanding business skills, strong cross-functional leadership, and the ability to discover market/customer needs and to develop profitable solutions to meet those needs. It also requires a set of very specific applied skills, and this course is intended to develop those skills. The class will focus on three primary areas:

- Ensuring Market Driven Development
- Ideating and Developing/Testing Prototypes
- Building Market Driven Product Roadmaps/Leading an Agile Development Process

MBA Prerequisite: MKT 402

MS Prerequisite: GBA 463

*MKT 414. PRICING POLICIES

(Same as STR 423)

Pricing is one of the most important, least understood, and most controversial decisions a manager has to make. These decisions often have significant long-term implications for a firm's bottom line. The purpose of this course is to help future managers make good decisions by preparing them to analyze the environment in which their firm operates and to arrive at an appropriate pricing policy for their product or service. More specifically, the objectives of the course are: 1) to develop an understanding of the relationship between a firm's environment (e.g., cost, demand, competition, and legal aspects) and its optimal pricing strategy, and 2) to develop skills in applying this understanding.

There are several components to the course: elasticity of demand and relevant costs, price discrimination and market segmentation, and competitive pricing. Students will learn the fundamentals of economic-value analysis and break-even analysis, and will be made familiar with strategies such as bundling, tie-in sales, quantity discounts, product-line pricing, and demand buildup. The course will cover ways of predicting competitor-pricing responses, and it will discuss a firm's legal environment as it pertains to pricing.

MBA Prerequisites: MKT 402, STR 401

MS Prerequisite: GBA 463

*MKT 421. ADVANCED MARKETING STRATEGY

This course has three main threads. First and most centrally is practicing and extending concepts related to strategic marketing decisions about R&D, production, pricing, product, advertising, and channels. Second, students learn to infuse these decisions with market intelligence. Third, students learn to develop spreadsheet models to support strategic decisions and presentations to communicate the business case for strategic plans. In the process, the course extends frameworks related to segmentation, targeting, product positioning, advertising, and channels. In addition, the course will introduce frameworks related to negotiation and crisis management. Through the process of a course-long simulation, teams will be challenged through the simulation experience to understand their own strengths and weaknesses and to work better as a team.

MBA Prerequisite: MKT 402

MKT 431. CONSUMER BEHAVIOR

The course studies buyer behavior in consumer and industrial markets. Topics include: culture, social class, consumer involvement, motivation, knowledge, attitudes and group decision making. Besides theory, the course also covers applications to product, advertising and pricing decisions.

MBA Prerequisite: MKT 402

MS Prerequisite: GBA 463

MKT 432. NEW PRODUCT STRATEGY

This course examines the issues involved in the planning, justification, and development of new products. We will fold in best practices from organizations like Pragmatic Marketing and Strategyzer (Business Model Canvas/ Value Proposition Design), along with the standard go-to processes and approaches followed in the business world today. The course explores the fundamentals of understanding market and customer needs to ensure products are developed based on market reality. We study the processes associated with the ideation, iteration and development of value propositions and explore how these value propositions must fit into a broader business model to find true success. Leading from this, we study new product development (NPD) processes, and explore the impact of disruptive innovation on crafting new solutions. We conclude with the exploration of the unique leadership skills required in a new product role. Select cases will be analyzed and discussed to embellish critical learnings. A term long project will have teams develop a value proposition and its associated business model.

MBA Prerequisites: MKT 402, GBA 412

MS Prerequisites: GBA 462, GBA 463

MKT 433. ADVERTISING STRATEGY

This course explores the tools available to marketers for the promotion of products and services. Integrated marketing communication philosophy is stressed and principles of consumer behavior are discussed as the starting point for the analysis of promotion decisions. Key elements are Digital Advertising, Creative Strategy, Media Planning, Media Mix Modeling, Measurement of Advertising Effectiveness, Coupons and Sales Promotions. Groups develop and present an advertising campaign for a New Product or Underperforming Product in an extremely competitive product category.

MBA Prerequisite: MKT 402

MS Prerequisite: GBA 463

*MKT 437. DIGITAL MARKETING STRATEGY (Same as CIS 437)

This course examines the major issues involved in marketing on the Internet. Among the topics studied are: new product opportunities on the Internet; the changed role of advertising; the Internet as a two-way communication medium with consumers; targeting individual consumers; word-of-mouth among consumers on the Internet; the Internet as a distribution channel; and marketing research on the Internet.

MBA Prerequisite: MKT 402

MS Prerequisite: GBA 463

MKT 438. B2B PRICING

(Same as STR 438)

Students will learn the major differences in pricing strategies between selling to consumers (as in MKT414/STR423) and to other firms which then deal with con-

sumers. The course starts by analyzing the pricing problem of a manufacturer selling to a retailer. We examine the issue of double marginalization, and learn how two-part tariffs get us out of this problem. We also examine different forms of contractual relations—from vertical acquisitions to regular short-term contracts—and potential issues with every form, touching on transfer pricing and outsourcing. In the second part of the course, we analyze a crucial concept of cost pass-through (how much a retailer should decrease the retail price in response to a decrease in the wholesale price) and the effect of manufacturer's advertising on the retailer and on the channel overall. This course is a natural continuation of Pricing for those who are interested in working in an industry where a significant portion of sales is done through independently-owned retailers, whether students are planning on working on the retailer side or on the manufacturer side of this industry.

Prerequisite: MKT 414/STR 423

*MKT 439. ADVANCED PRICING

(Same as STR 439)

This course builds on MKT 414/STR 423 to equip students with the necessary skills to make profitable pricing decisions in complex business environments. Topics include: pricing with constrained supply, pricing in the presence of uncertainty about demand, markdown management, advance selling, pricing on the internet, pricing in the presence of direct or indirect network effects, selling through auctions, and behavioral and ethical aspects of pricing. The course also includes a comprehensive pricing simulation.

Prerequisite: MKT 414/STR 423

*MKT 440. PRICING ANALYTICS

The objective of this course is to prepare students with the intuition and tools to make pricing recommendations, and to meet the booming demand in pricing and consulting related careers. The course builds around applying state-of-the-art data analysis toolkit to data of historical sales to predict underlying consumer demand. We study analytical methods suitable for different types of data structure and different pricing objectives. Topics covered include pricing against competing products, product positioning and finding market segments.

Prerequisite: GBA 436 or CIS 417

*MKT 441. BRAND MANAGEMENT WORKSHOP

3 credits

This course is the capstone course of the Brand Management Track. Lectures focus on scanner data analysis, and guest speakers discuss timely brand management topics. The main focus is a team project performed for a major consumer packaged goods firm, requiring the analysis of various current data sources, most notably scanner data. The major deliverable is a presentation to the client by each team of their findings. Typically, this amounts to performing a brand review.

MBA Prerequisite: MKT 402

MKT 442. SPECIAL TOPICS IN MARKETING

Special topics are generally those which are not well covered in other courses, or they may deal with marketing in selected industries (e.g., financial services, high-tech marketing, etc.). The specific content of the course varies, depending on faculty interests.

Prerequisite: Permission of the Instructor

MKT 448. BRAND STRATEGY

This course outlines essential brand building strategies to sustain growth, as practiced by industry leaders. This interactive course consists of a combination of guest speakers from leading CPG companies, local agencies and brand consultants. In addition, team members will conduct a consulting project for a local company, addressing the following questions:

- How does the marketplace perceive the firm?
- What is the firms competitive branding advantage?
- What marketing recommendations should be leveraged to obtain the firm's desired point of difference and positioning?

A series of frameworks and tools will be introduced throughout the semester to develop specific brand strategies, focusing on the following:

1. Identifying consumer behavior to develop insights, targets and segments, determining which consumers to serve.
2. Defining brand equity and leveraging iconic assets and campaigns, including brand purpose and cause marketing to determine competitive advantage.
3. Analyzing Path to Purchase, including zero, first and second moments of truth to generate consumer acquisition and retention.
4. Assessing competition in the marketplace to understand what's working/not working.

The synthesis of all these elements is carried out using case studies and classroom lectures and discussion to prepare students for the branding consultation project. Multiple team meetings with the client firm may be required outside of the scheduled class times. Grading is based on class participation, case preparation, and professor and client evaluation of team final project presentation.

At the end of the course, students will be able to develop a consumer centric branding strategy, illuminating the strength of any particular brand.

MBA Prerequisite: MKT 402

MKT 449. GLOBAL MARKETING STRATEGY

This course will develop the concepts of marketing strategy in the context of the resource-based view of the firm and the-market focus view of the firm. Marketing strategy formulation and implementation will be related to strategies at the corporate and business unit level as well as other functional areas of the organi zation. The analytical tools and concepts for strategic analysis will be developed from basic economic principles. Core MBA subject matter will be integrated in the course as a part of the analysis and construction of a marketing strategy. The course examines the importance of bilateral information flows between the firm and the marketplace in defining new product requirements, changing competitive conditions, product advertising, and strategic commitment. The definition of new core capabilities and the use of existing unique resources in creating competitive advantage will be explored. Special emphasis will be given to the impact of globalization and technology on the formulation and implementation of marketing strategy.

MBA Prerequisite: MKT 402

MS Prerequisite: GBA 463

MKT 450. PRODUCT MANAGEMENT WORKSHOP

3 credits

This class provides students an opportunity to apply previous skills and expe riences, along with new Simon skills, to a real client project. Students work on,

and solve, an actual product centric challenge for the client. These are not tertiary projects. They are projects that will change the course of these businesses. Every one of them is rich with the opportunity to learn and to provide true value.

Two primary frameworks will be used to develop client recommendations. The first is the Structured Problem-Solving framework taught in GBA 401. The second is the Momentum framework. The Momentum Framework will help teams to organize and communicate their solution's inputs and outputs into a clear strategy, an executable set of tactics and a well-articulated set of product goals and metrics that are tied to the product's contribution to margin.

MBA Prerequisite: MKT 402

*MKT 451. CONSUMER AND BRAND RESEARCH

This course focuses on key marketing research topics related to consumer and brand measurement and the analysis of this information to generate insights

leading to improved marketing decisions. Class time will consist of lectures by the professor and guests concerning key consumer measures and related analysis tools and methodologies. Topics include churn analysis and consumer lifetime value, discrete choice methods, segmentation and targeting methods, store scanner data measurement, sampling and scenario analysis. In conjunction with these topics, students will be introduced to associated R and Excel/Tableau programming and example data sets. The idea is to provide students with not just an understanding of what the key consumer and brand metrics, tools and methods are, but also provide experiences in designing research plans, analyzing relevant data sets and making managerially useful recommendations.

Note: students who have taken MKT412 are not allowed to take MKT 451.

MBA Prerequisite: MKT 402

MS Prerequisite: GBA 463

*MKT 465 MARKETING ANALYTICS PROJECTS

3 credits

This course serves as a practical capstone experience for the MS Marketing Analytics program. Partnering with corporate sponsors, student teams put their training to use in database projects which address practical marketing issues. Corporate guest speakers and practicing analysts guide students in their project work. Strong emphasis is placed on the "context" for applied analytics: the competitive market environment of the firm, customer attributes and sensitivities, marketing program recommendations and optimum business decision-making.

*MKT 472 MARKETING MANAGEMENT ANALYTICS

Marketing management is a complex business function that requires various skills for effective strategy formulation and marketing plan implementation. The key objectives of this course are (1) to provide you with a series of frameworks for identifying, analyzing, and solving-marketing problems with an emphasis on analytic tools to achieve this aim, and (2) to enhance your ability to effectively communicate your analyses and solutions.

PHD COURSES

MKT 505. MARKETING RESEARCH PHD WORKSHOP

3 credits

This workshop provides a forum for the presentation of research ideas and completed research by students. The course includes discussion of current job market papers and job market presentations, journal reviewing, and generating new research ideas. In addition, some topics are covered to illustrate current research areas of interest for the faculty. All marketing PhD students who are not on the job market are expected to participate actively.

Prerequisite: Permission of the instructor

MKT 511. CORE RESEARCH TOPICS IN QUANTITATIVE MARKETING

3 credits

This course is designed for first, second, and third year students to provide exposure to the literature related to core research methods used in quantitative marketing research and to build student appreciation of what goes into conducting research in quantitative marketing. The content of the course varies by year with similar core topics, but rotating papers, and some rotating topics. The core topics include choice models, aggregate demand models, Bayesian models, consumer heterogeneity, and state dependence. Rotating topics have included structural model identification, experimentation, causal inference, search, learning, advertising effects, and conjoint analysis, and rotate each year. In addition, the course provides exposures to other perspectives on quantitative research. Course evaluation includes coding assignments and homework's, and the final exam has both coding and conceptual parts to it. In addition, the students are expected to submit a paper and present their own research.

Prerequisite: Permission of the instructor

MKT 512. ADVANCED TOPICS IN QUANTITATIVE MARKETING RESEARCH

3 credits

This course covers advanced topics in quantitative marketing research. The topics rotate each time offered and are selected based on current topical areas in the marketing, economics, and related fields as well as student and faculty research interests. Part of the evaluation in the course is to submit a paper and present their own research. All marketing PhD students who are not on the job market are expected to participate actively.

Prerequisite: Permission of the Instructor

■ OPERATIONS MANAGEMENT

Harry Groenevelt, Area Coordinator

MASTERS LEVEL COURSES

*OMG 402. OPERATIONS MANAGEMENT

Operations Management introduces the concepts and skills needed to design, manage, and improve service and manufacturing operations. The course develops a managerial perspective of the operations function and an appreciation of the role that operations plays in creating and maintaining a firm's competitive edge. The course introduces process analysis, performance measurement systems for operations, and production control systems.

Quantitative models and case studies apply these skills to service process management, manufacturing, inventory control, supply chain management and project management. The course highlights the role of effective operations management in the strategic direction of the firm as well as the connections between operations and other functional areas.

MBA Prerequisite: GBA 412

MS Prerequisite: GBA 462

*OMG 411. SUPPLY CHAIN ANALYTICS

This course gives an overview of supply chain management in a wide variety of industries such as: groceries, style goods, consumer electronics and services. The impact of shifts from traditional channels to e-commerce will be emphasized. New initiatives introduced to address these new challenges, such as vendor managed inventory (VMI), variety postponement, cross docking, real options contracts and quick response, will be studied and applied both in class and assignments. Supporting software, such as Enterprise Resource Planning (ERP) and supply chain tools, will also be discussed.

Prerequisite: OMG 402

*OMG 415. PROCESS IMPROVEMENT

This course will teach a systematic method for understanding and improving ongoing business processes. The techniques learned in this class provide a systematic method of asking questions, collecting data, and analyzing that data to learn how processes work (or are failing) and what can be changed to improve them. The statistical techniques you will learn are SPC (Statistical Process Control, used as a proactive tool for investigation rather than its traditional role as a reactive tool), MSA (Measurement Systems Analysis, for determining if your measurement system is capable), FMEA (Failure Modes and Effects Analysis), and DOE (Design of Experiments). In addition to these analysis tools, there will be a strong emphasis on the process of data acquisition. To support the process of acquiring the right data and learning the analysis tools, you will do a small outside project for the class and a series of in-class simulations. You will learn to use two additional tools that support the questioning that leads to good data acquisition: process mapping (of the process you will be improving) and thought process mapping (of the process you use to solve the client's problem).

MBA Prerequisite: OMG 402

*OMG 416. PROJECT MANAGEMENT

The topics treated in this course span a wide spectrum of issues, concepts, systems, and techniques for managing projects effectively in today's complex business environment. Students are led through a complete project life cycle, from requirements analysis and project definition to start-up, reviews, and phaseout. Important techniques for controlling project costs, schedules, and performance are studied. The course employs a combination of lectures, case analyses, business/project simulations, videos, Internet resources, and group discussions to develop the conceptual understanding and operational skills needed for effective managerial role performance.

MBA Prerequisite: OMG 402

OMG 437. MANAGING HEALTH CARE OPERATIONS

(Same as HSM 437)

The health care industry is undergoing rapid growth as well as rapid structural changes. New technology, changing reimbursement mechanisms, and increased competition create many interesting management problems, not in the least in the area of health care operations. In this course, we will study the operations of various types of health care provider organizations (such as hospitals, HMO's, group practices, nursing homes, etc.) and other participants in the industry (such as insurance companies, pharmaceutical companies, suppliers and consulting companies). Topics that will be studied include: patient and provider scheduling, capacity management, providing services and supplies to health care providers, new product development and integrated delivery systems.

Students who took OMG 402 need to obtain instructor's permission prior to registration.

OMG 461. STRATEGY AND BUSINESS SYSTEMS CONSULTING PRACTICUM

(Same as CIS 461 and STR 461)

This course provides an introduction to strategy and business systems consulting. It is primarily aimed at those exploring career opportunities in consulting but will also help students become savvy consumers of consulting services. It includes a live project helping a client at a real organization answer an important question or achieve a significant business objective. Student teams work together to deliver a set of well-reasoned impactful recommendations based upon thoughtful analysis of the relevant facts. In this way students consolidate their understanding of the problem solving approaches introduced in GBA401 through experiential learning.

*OMG 472. OPERATIONS AND SUPPLY CHAIN ANALYTICS

This course focuses on how analytics tools can be applied to modern operations problems. The emphasis is on building and using performance evaluation, simulation, and optimization models to solve operations problems, and communicating the results in a convincing manner, both in written reports and in oral presentations.

ADMINISTRATION

MITCHELL J. LOVETT

Interim Dean; Benjamin Forman Professor of Marketing; Center of Excellence in Data Science Distinguished Researcher, Goergen Institute of Data Science

Mitchell J. Lovett is the Interim Dean of Simon Business school. He is also a leading scholar and teacher as the Benjamin Forman Professor of Marketing. He joined the Simon Business School in 2008 after earning his PhD in marketing from Duke University.

In his prior administrative roles, he has been instrumental in launching the AI Initiative, a cross-disciplinary effort to integrate AI into Simon's business education. He also led the development of a Doctor of Business Administration program and two AI-focused masters programs, the Online Masters in Business Analytics and Applied AI and the Masters of Artificial Intelligence in Business, that prepare students for the rapidly evolving data and AI-driven economy.

His research interests span a wide range of topics in marketing, such as advertising, branding, word-of-mouth, political marketing, consumer and firm learning, retailing, and conjoint analysis. He applies and develops empirical methods to study marketing phenomena and to inform marketing decisions. His research has been published in top journals in marketing and political science, and garnered recognitions such as the Marketing Science Institute's Young Scholars and Scholars distinctions, and the William F. O'Dell award finalist for long-term impact. His research has also attracted national media attention, and he has been cited in outlets such as the New York Times, Forbes, and Ad Age. He advises PhD students and is an award-winning teacher including for courses on marketing research, marketing strategy, analytics design and applications, advertising strategy, consumer behavior, and PhD seminars in quantitative marketing.

BA, Mathematics, Economics, German, Ohio Wesleyan University

MBA, Boise State University

PhD, Business Administration,

Duke University

JIM BRICKLEY

Senior Associate Dean of Faculty and Research; Gleason Professor of Business Administration; Professor of Economics and Management

Brickley has served as a full-time faculty member at the Simon School since 1990. He is currently the Gleason Professor of Business Administration and Senior Associate Dean of Faculty and Research. His primary research interests are in the areas of corporate governance and the economics of organizations. Brickley is a past winner of the Simon School's Distinguished Teaching Award. He has also been listed multiple times on the School's Teaching Honor Roll. Brickley has consulted with various corporations and law firms.

Professor Brickley has research and teaching interests in the economics of organizations, corporate governance, executive compensation, corporate finance, franchising, and banking. His papers have been published in the Journal of Business, the Journal of Law and Economics, the Journal of Finance, the Journal of Accounting and Economics, the Journal of Financial Economics, the Journal of Economic Perspectives, the Journal of Law Economics and Organizations, the Journal of Empirical Legal Studies, the Journal of Economic Behavior and Organization, Health Economics, the Journal of Risk and Insurance, the Journal of Financial and Quantitative Analysis, Financial Management, and the Journal of Corporate Finance. The seventh edition of Managerial Economics and Organizational Architecture (authored by Brickley, Clifford W. Smith Jr. and Jerold L. Zimmerman) was published by McGraw-Hill/Irwin in 2021. Brickley, Smith, Zimmerman and Janice Willett authored a trade version of this text entitled Designing Organizations to Create Value in 2003. Brickley and Smith published An Advanced Introduction to Corporate Finance in 2022 (Edward Elgar Publisher). Brickley has served as associate editor of finance and accounting journals. Various studies have reported that Brickley is among the more cited researchers in leading finance journals. In 2002, three of his published papers received the Journal of Financial Economics All Star Paper Award (based on number of citations).

BS, Economics, University of Oregon

MS, Economics, University of Oregon

PhD, Finance, University of Oregon

ADMINISTRATION

RON GOETTLER

Senior Associate Dean of Education and Innovation; James N. Doyle Sr. Professor of Entrepreneurship; Professor of Economics, Marketing, and Entrepreneurship

Professor Goettler joined Simon Business School in 2012 and served as Senior Associate Dean of Faculty and Research for Simon Business School from 2014-2022. He teaches economics, marketing, strategy and entrepreneurial finance in Simon's MBA and MS programs and is a faculty representative on the board of the Simon School Venture Fund (SSVF) helping student teams assess investment prospects and manage portfolio firms. His research spans quantitative marketing, industrial organization, and finance, with an emphasis on structural econometric methods to understand consumer and firm behavior. He is particularly interested in high-tech industries, focusing on the relationship between competition and innovation, and on the marketing of new products. Before joining the Simon School faculty, Goettler was an Assistant Professor of Marketing at the University of Chicago. From 2022-2024 he served as Chief Economist for Amazon Web Services.

BA, Economics, Miami University

PhD, Economics, Yale University

RAVI MANTENA

Associate Dean of Education and Innovation; Faculty Director of MBA Programs; Janice M. and Joseph T. Willett Professor of Business Administration for Teaching and Service; Clinical Professor of Information Systems and Technology

Professor Mantena has been on the faculty of the Simon Business School since 2004. As an Associate Dean of Education and Innovation, he is responsible for strategic management of the educational programs in his portfolio, as well as for leading the design and implementation of new programs. As Faculty Director of MBA Programs, Professor Mantena leads Simon's Full-Time, Professional, and Executive MBA programs. He is responsible for curriculum oversight, strategic planning, and cross-functional collaboration with teams in admissions, career services, and student engagement. He also manages the programs' external reputation and serves as a key representative to students, alumni, and other stakeholders.

A highly recognized educator, Professor Mantena is a multiple-time recipient of the School's Superior Teaching Award and is regularly featured on Simon's Teaching Honor Roll. He teaches graduate-level courses in data analysis, business modeling, business analytics, digital strategy, and healthcare management. His teaching experience also includes appointments at the NYU Stern School of Business and the Indian School of Business.

Professor Mantena's scholarly expertise is in the economics of digital and information-intensive products, and in business analytics. His research focuses on pricing, strategy, and competition in technology-driven markets, and on how data can be used to enhance decision-making and organizational performance.

Before entering academia, Professor Mantena worked in marketing within the consumer packaged goods industry and co-founded an aquaculture business in India.

BE (Hons) Electrical & Electronics Engineering, Birla Institute of Technology & Science

MBA, Indian Institute of Management Calcutta

PhD, MPhil, New York University

FACULTY

KRISTINA BRECKO
Assistant Professor of Marketing
BA, Economics, Cornell University
MA, Economics, Stanford University
PhD, Marketing, Stanford University

JAMES A. BRICKLEY
Gleason Professor of Business Administration
BS, Economics, University of Oregon
MS, Economics, University of Oregon
PhD, Finance, University of Oregon

DANIEL J. BURNSIDE
Clinical Professor of Finance; Faculty Director of the MS Finance Program
BS, Engineering, Cornell University
MS, Engineering, Cornell University
MBA, University of Rochester
PhD, Engineering and Mathematics, Cornell University

HANA CHOI
Assistant Professor of Marketing
BS, Business Administration & Economics, Yonsei University
MA, Economics, University of Pennsylvania
PhD, Quantitative Marketing, Duke University

ROBERTO COLANGELO
Executive Professor of Competitive Strategy, Innovation, Global Marketing and Entrepreneurship; Faculty Advisor of the Ain Center for Entrepreneurship and Innovation; Robert Sperandio Distinguished Professorship in Entrepeneurship
BS, Business & Economics, State University of New York
MA, Economic Development, State University of New York

LINDA DALEY
Clinical Associate Professor of Management Communication
BA, Journalism, St. Michael's College
MA, Communication, University of New Mexico
PhD, Mass Communications, Syracuse University

PAUL ELLICKSON
Michael and Diane Jones Professor of Business Administration Professor of Marketing
AB, Economics and Mathematics, University of California-Berkeley
PhD, Economics, Massachusetts Institute of Technology

RONALD GOETTLER
James N. Doyle Professor of Entrepreneurship
BA, Economics, Miami University
MA, Economics, Yale University
M.Phil., Economics, Yale University
PhD, Economics, Yale University

ALI GOLI
Assistant Professor of Marketing
BS, Electrical Engineering and Pure Mathematics, Sharif University of Technology
MS, Industrial Engineering, University of Toronto
PhD, Quantitative Marketing, University of Chicago

HARRY GROENEVELT
Associate Professor of Operations Management
BS, Econometrics, Vrije Universiteit
MS, Econometrics, Vrije Universiteit
PhD, Operations Research, Columbia University

RONALD W. HANSEN
William H. Meckling Professor Emeritus of Business Administration
BA, Mathematics, Northwestern University
MA, Economics, University of Chicago
PhD, Economics, University of Chicago

AVERY HAVIV
Associate Professor of Marketing
BMath, Statistics, University of Waterloo
MSc, Statistics, University of Toronto
PhD, Quantitative Marketing, University of Toronto

YUFENG HUANG
Associate Professor of Marketing
BSc, Economics, Sun Yat-sen University
MS Research, Economics, Tilburg University
PhD, Marketing, Tilburg University

GLENN D. HUELS
Clinical Associate Professor of Accounting

BS, Business Administration, State University of New York-Buffalo

MBA, Rochester Institute of Technology

TIMOTHY HUNGERFORD
Clinical Associate Professor of Accounting; Faculty Director of MS in Accounting

BBA, Accounting, Niagara University

MS, Finance, Rochester Institute of Technology

THOMAS H. JACKSON
Distinguished University Professor and President Emeritus

BA, American Studies, Williams College

JD, Yale University

SUDARSHAN JAYARAMAN
Wesray Professor of Business Administration; Professor of Accounting

B.Com., University of Bombay

MBA, Bentley College

PhD, University of North Carolina-Chapel Hill

ROY JONES
Clinical Professor of Information Systems and Technology

BA, History, Stanford University

MS, Computer Science, Stanford University

PhD, Operations, Information and Technology, Stanford University

ALEXANDR KOPYTOV
Assistant Professor of Finance

BS, Applied Physics & Mathematics, Moscow Institute of Physics and Technology

MA, Economics, New Economic School

PhD, Finance, University of Pennsylvania

JOSEPH KALMENOVITZ
Assistant Professor of Finance

BA, Economics and Law, Hebrew University of Jerusalem

M.Phil, Finance, New York University

PhD, Finance, New York University

RON KANIEL
Jay S. and Jeanne P. Benet Professor of Finance

BSc, Mathematics and Computer Science, Hebrew University of Jerusalem

MSc, Computer Science, Hebrew University of Jerusalem

PhD, Finance, University of Pennsylvania

DAN KEATING
Clinical Assistant Professor; Faculty Director of Academic Support

BA, English, College of the Holy Cross

MBA, University of Rochester-Simon Business School

DENNIS KESSLER
Edward J. and Agnes V. Ackley Clinical Professor of Entrepreneurship

MA, Sociology, John Jay College of Criminal Justice

MSL, Yale University Law School

LLM, Northwestern University School of Law Certificate of Business Administration, Instituto de Empresa

NARAYANA KOCHERLAKOTA
Professor of Finance; Louise and Henry Epstein Professor of Business Administration

AB, Economics, University of Chicago

PhD, Princeton University

PHILLIP J. LEDERER
Professor Emeritus of Operations Management

BS, Physics, State University of New York-Stony Brook

MS, Applied Mathematics, Northwestern University

PhD, Applied Mathematics, Northwestern University

YOUNG SUN LEE
Clinical Associate Professor of Management Communication

BA, Political Science, Chung-Ang University

MA, Journalism and Mass Communication, Chung-Ang University

PhD, Communications, Florida State University

YUKUN LIU
Associate Professor of Finance; William H. Meckling Assistant Professor of Business Administration

BA, Economics & Mathematics, Cornell University

PhD, Economics, Yale University

AMANDA LOHISER
Clinical Assistant Professor of Management Communication

BA, Communication, State University of New York-Buffalo

MS, Multidisciplinary Studies: Public Relations Management, State University of New York-Buffalo

MS, Creative Studies, State University of New York-Buffalo

PhD, Communication, State University of New York-Buffalo

JOHN B. LONG JR.
Frontier Communications/Rochester Telephone Professor Emeritus; Professor Emeritus of Finance

BA, Mathematics, Rice University

PhD, Industrial Administration, Carnegie Mellon University

MIKHAIL LYSYAKOV
Assistant Professor of Information Systems and Technology

BS, Power Engineering, Tashkent State Technical University

MBA, University of Georgia

PhD, Information Systems, University of Maryland

EKATERINA (KATE) MALOVA
Clinical Assistant Professor of Management Communication

BA, Linguistics and Translation Studies, Yaroslav State Pedagogical University-Russia

MA, Corporate Communication, Catholic University of the Sacred Heart, Italy

PhD, Communication, University of Miami

RAVINDRA N. MANTENA
Janice M. and Joseph T. Willet Professor of Business Administration for Teaching and Service; Clinical Professor of Information Systems and Technology; Faculty Director of the MBA Program

BE, Electrical Engineering, Birla Institute of Technology and Science

MBA, Business Management, Indian Institute of Management

M.Phil, PhD, Information Systems, New York University

DREW MARSHERALL
Clinical Associate Professor of Management Communication

BA, Communication/Journalism, St. John Fisher College

MA, Organizational Leadership, Medaille College

EdD, Executive Leadership, St. John Fisher

ANDRÁS MIKLÓS
Clinical Associate Professor

MA, Political Science, Central European University

PhD, Political Science, Central European University

JEANINE MIKLÓS-THAL
Fred H. Gowen Professor of Economics and Management; Professor of Economics and Marketing

Propaedeuse, International Economic Studies, Maastricht University

Propaedeuse, Econometrics, Maastricht University

MA, Economics, Maastricht University

DEA, Economic Theory and Econometrics, University of Toulouse 1

PhD, Economics, University of Toulouse 1

DEREK MOHR
Clinical Associate Professor of Finance

BA, Financial Administration, Michigan State University

MS, Applied Economics, University of Rochester

JD, School of Law, Case Western Reserve University

LIZA MOHR
Clinical Associate Professor of Business Administration; Faculty Director of the MS Business Analytics Program

BA, Economics and Mathematics, Columbia University

MA, Economics, University of Rochester

ALAN MOREIRA
Associate Professor of Finance

BS, Industrial Engineering, Rio de Janeiro Federal University

MA, Economics, Rio de Janeiro Federal University

PhD, Finance, University of Chicago

RUSSELL MORTON
Assistant Professor of Economics and Management

BS, Economics, Princeton University

MA, Economics, University of Michigan

PhD, Economics, University of Michigan

PAUL NELSON
Clinical Professor of Marketing; Faculty Director of the MS Marketing Analytics Program

BA, Mathematics, Economics and Business, Macalester College

MS, Business Administration, University of Rochester

PhD, Business Administration, University of Rochester

ELENA NESCIO
Clinical Associate Professor of Marketing

BS, Electronic Media Production, Kent State University

BA, English, Kent State University

MBA, University of California–Berkeley

ROBERT NOVY-MARX
Lori and Alan S. Zekelman Distinguished Professor of Finance

BS, Physics, Swarthmore College

PhD, Finance, University of California–Berkeley

SAM OGIE
Clinical Assistant Professor

BS, Mechanical Engineering, State University of New York-Buffalo

MBA, University of Rochester

DAVID J. OLIVEIRI
Executive Professor of Business Administration

BS, Accounting, University at Buffalo

JD, University at Buffalo

MBA, University of Rochester

CHRISTIAN OPP
Professor of Finance; Director of PhD Program

Vordiplom, Business Administration, Catholic University of Eichstaett-Ingolstadt

MS, Accounting and Finance, London School of Economics & Political Science

Diplom, Business Economics, University of Mannheim

MBA, University of Chicago

PhD, Finance, University of Chicago

VIVEK PANDEY
Assistant Professor of Accounting

BE, Shivaji University, India

MBA, Indian Institute of Management, India

PhD, Accounting, University of Southern California

ELENA PRAGER
Assistant Professor of Economics

International BBA, York University

MS, Healthcare Management, University of Pennsylvania

PhD, Managerial Sciences and Applied Economics, University of Pennsylvania

ALEX PRIEST
Assistant Professor of Finance

BS, Business Administration, Texas Tech University

MS, Finance, University of Texas

PhD, Finance, University of Texas

DAVID PRIMO
Ani and Mark Gabrellian Professor; Professor of Political Science; Professor of Business Administration

BA, Economics and Political Science, Brown University

MA, Political Science, Brown University

MA, Economics, Stanford University

PhD, Political Science, Stanford University

JAMES PRINZI
Executive Professor

BA, Mathematics & Economics, St. John Fisher College

MS, Marketing, University of Rochester

PhD, Marketing, California Coast University

MICHAEL A. RAITH
Associate Professor of Economics and Management

Vordiplom, Economics, University of Bielefeld

Vordiplom, Computer Science, Fernuniversität Hagen

Diplom, Economics, University of Bonn

PhD, Economics, London School of Economics

RICKY ROET-GREEN
Associate Professor of Operations Management

BA, Economics and Political Science, Tel Aviv University

MA, Political Science, Tel Aviv University

MSc., Applied Mathematics, Tel Aviv University

PhD, Operations Research, Tel Aviv University

ZACH ROTH
Clinical Assistant Professor of Business Administration; Faculty Director of the MS in Business Analytics and Applied AI Program

BS, Information Technology, Rochester Institute of Technology

MS, Information Technology, Rochester Institute of Technology

MBA, University of Rochester

HUAXIA RUI
Xerox Professor of Information Systems and Technology

BE, ME, Control Science and Engineering, Tsinghua University

PhD, Information Management, The University of Texas-Austin

RONALD M. SCHMIDT
Janice M. and Joseph T. Willett Emeritus Professor of Business Administration for Teaching and Service

BA, Economics, The Ohio State University

MA, Economics, The Ohio State University

G. WILLIAM SCHWERT
Distinguished University Professor Emeritus of Finance and Statistics

AB, Economics, Trinity College

MBA, Finance, Econometrics, University of Chicago

PhD, Finance, Econometrics, University of Chicago

ABRAHAM SEIDMANN
Xerox Professor Emeritus Information Systems and Technology

BSc, Industrial and Management Engineering, Technion, Israel Institute of Technology

MSc, Operations Research, Technion, Israel Institute of Technology

PhD, Industrial Engineering, Texas Tech University

GREG SHAFFER
John M. Olin Distinguished Professor; Professor of Economics
and Management and Marketing

BA, Economics and Mathematics, Swarthmore College

MA, Economics, Princeton University

PhD, Economics, Princeton University

JOHN SCHLOFF
Executive Professor

BA, Economics, University of Southern California

MBA, Pepperdine University

PAUL F. SHANAHAN
Executive Professor

BS, Management Law and Economics, Rensselaer Polytechnic Institute

JD, Albany Law School of Union University

THOM SHAW
Executive Professor of Management Communication and Leadership

BA, English, Yale University

MA, English and American Literature, University of Chicago

MFA, Creative Writing, Emerson College

YARON SHAPOSHNIK
Associate Professor of Operations Management

BS, Information Systems Engineering, Technion- Israel Institute of Technology

MS, Industrial Engineering, Technion- Israel Institute of Technology

PhD, Operations Research, Massachusetts Institute of Technology

JONATHAN SHIPLEY
Clinical Assistant Professor of Management Communication; Faculty Director of Undergraduate Program

BA, Speech Communication, Utah State University

PhD, Organizational Communication, Texas A&M University

CAROL C. SHUHERK
Clinical Professor of Management Communication

PhD, Rhetoric and Communication, University of Oregon

CLIFFORD W. SMITH, JR
Louise and Henry Epstein Emeritus Professor of Business Administration and Emeritus Professor of Finance and Economics

BA, Economics, Emory University

PhD, Economics, University of North Carolina-Chapel Hill

TAKEAKI SUNADA
Assistant Professor of Marketing

BA, Economics, International Christian University

MS, Economics, University of Tokyo

PhD, Economics, University of Pennsylvania

TECK YONG TAN
Assistant Professor of Economics and Management

B.Sc., Mathematics, National University of Singapore

BA, Economics, National University of Singapore

M.Sc., Economics, Toulouse School of Economics

M.Res., Economics, University College London

PhD, Economics, Columbia University

DAVID TILSON
Clinical Professor of Information Systems and Technology

BEng, Electrical and Electronic Engineering, Queen's University of Belfast

MSc, Telecommunications Engineering, University of London

MBA, Information Systems and Entrepreneurship, University of Texas-Austin

PhD, Information Systems, Case Western Reserve University

VERA TILSON
Associate Professor of Operations Management

SB, Electrical Engineering, Massachusetts Institute of Technology

MS, Applied Mathematics, Colorado School of Mines

PhD, Operations Management, Case Western Reserve University

HEIDI TRIBUNELLA
Clinical Professor of Accounting

BS, Accounting, State University of New York-Geneseo

MS, Accountancy, State University of New York Institute of Technology

Certified Public Accountant, New York State License

GIULIO TRIGILIA
Assistant Professor of Finance

MA, Economics, Collegio Carlo Alberto

MA, International Relations, University of Bologna

PhD, Economics, University of Warwick

JEROLD B. WARNER
Fred H. Gowen Professor Emeritus of Business Administration; Professor of Finance

BS, Economics, University of Pennsylvania

MA, Operations Research, Yale University

MBA, Economics and Finance, University of Chicago

PhD, Economics and Finance, University of Chicago

CHARLES E. WASLEY
Joseph and Janice Willett Distinguished Scholar; Professor of Accounting

BS, Accounting, State University of New York-Binghamton

MS, Accounting, State University of New York-Binghamton

PhD, Accounting, The University of Iowa

GERARD J. WEDIG
Associate Professor of Business Administration; Academic Director of Health Care Programs

BS, Economics, Washington University

MA, Economics, Harvard University

PhD, Economics, Harvard University

KURT WOJDAT
Senior Lecturer

BS, Accounting, State University of New York-Albany

MBA, Finance, University of Rochester

PhD, Accounting, University at Buffalo

JOANNA WU
Susanna and Evans Y. Lam Professor of Accounting

BA, International Economics, Beijing University

MA, Economics, Tulane University

PhD, Business Administration, Tulane University

TIANLI XIA
Assistant Professor of Marketing

BA, Economics, Fudan University

PhD, Economics, University of Wisconsin-Madison

BILLY XU
Assistant Professor of Finance

BS, Mathematics, The University of Texas at Austin

BBA, Busines Honors and Finance, The University of Texas at Austin

PhD, Finance, Rice University

JINYANG ZHENG
Visting Assistant Professor of Information Systems and Technology

BS, Statistics, Fudan University

MS, Business Administration, University of Washington

PhD, Business Administration, University of Washington

JEROLD L. ZIMMERMAN
Ronald L. Bittner Professor Emeritus; Professor Emeritus of Accounting

BS, Finance, University of Colorado

PhD, Business Administration, University of California-Berkeley

PAVEL ZRYUMOV
Assistant Professor of Finance

Mathematics, Moscow State University

MA, Economics, New Economics School

PhD, Finance, Stanford University

ADJUNCT FACULTY

BRAD BANIKOWSKI
Lecturer in General Business Administration
BS, Philosophy, Syracuse University
MPA, Syracuse University
MBA, University of Rochester

JOHN BRAMLEY
Lecturer in Health Service Management
BS, Biology, The College of William and Mary
MS, Finance, Purdue University

SEAN FLAHERTY
Lecturer in General Business Administration
BS, Molecular Genetics, University of Rochester
MBA, University of Rochester

BARRY A. FRIEDMAN
Lecturer in Economics and Management
BS, Psychology and Political Science, University of Rochester
PhD, Industrial and Organizational Psychology, Ohio State University

GEORGE GIBSON
Lecturer in Information Systems and Technology
BA, Chemistry, Binghamton University
MS, Chemistry, Binghamton University
MBA, University of Rochester

JOHN HANDLEY
Lecturer in Information Systems and Technology
BS, Mathematics, Ohio State University
MS, Mathematics, Ohio State University
PhD, Imaging Science, Rochester Institute of Technology

CRISSANDRA HARRISON
Lecturer in General Business Administration

CHRISTOPHER HUELS
Lecturer in Marketing
BA, Communication, State University of New York-Buffalo
MBA, Montclair State University

RICHARD C. INSALACO
Lecturer in Finance
BA, Political Science, University of Rochester
JD, University of Michigan

RAMI KATZ
Lecturer in Entrepreneurship
MBA, University of Rochester
JD, Tel-Aviv University

MATHEW MAZZAFERRO
Lecturer in Marketing
BA, Biology, University of Rochester
MBA, University of Rochester

ANDREA MENINI
Lecturer in Accounting
BS, Statistical and Economic Sciences, University of Padova, Italy
PhD, Economics and Management, University of Padova, Italy

MICHAEL RIEDLINGER
Lecturer in Entrepreneurship
BFA, Rochester Institute of Technology
MBA, Finance and Accounting, University of Rochester

MITCH SANDERS
Lecturer in Information Systems and Technology
BA, Mathematics and Political Science, Duke University
PhD, Political Science, University of Rochester

JEFFREY SOKOL
Lecturer in Entrepreneurship
BS, Chemical Engineering, University of Rochester
MBA, University of Rochester

SHANE SUREK
Lecturer in Management Science Models
BS, Bioengineering, Syracuse University
MS, Secondary Mathematics Education, Syracuse University

TRUMAN TOLEFREE
Lecturer in General Business
BA, Finance, Morehouse College
MBA, Finance, Cornell University

THOMAS TRIBUNELLA
Lecturer in Accounting
MBA, Accounting, Rochester Institute of Technology
PhD, Information Science, State University of New York-Albany
Certified Public Accountant, New York State License

KATE WASHINGTON
Lecturer in Entrepreneurship

BM, Syracuse University

MBA, University of Rochester

EMILY ZHANG
Lecturer in Information Systems and Technology

BS, Chemistry, Peking University

PhD, Computational Chemistry, Boston University

2025-2026 ACADEMIC YEAR UPDATES

8/8/2025

- Changed Tier 2 from Choose 3 to Choose 4 for the Venture Capital and Private Equity concentration.
- Removed the India, South Africa, and Singapore immersions.
- Removed BPP 442X, ENT 442A, ENT 442X, ENT 445, GBA 442X and GBA 443 from the course descriptions.
- Added Career Management Center section, CMC 400 and CMC 460 to the course descriptions.

9/17/2025

- Moved CIS 438 from Fall B to Spring B for the MS AI in Business program.
- Changed CIS 438 course name to "Agentic AI Application".
- Updated JAGSoM articulation agreement for Miles MSA program.
- Removed IIM-Indore articulation agreement for Miles MSA program.
- Moved GBA 468P from Core Courses to Electives for the MS in Marketing Analytics program.

10/10/2025

- Updated course description for BPP 442.
- Moved FIN 421, BPP 426 to Spring A and FIN 448 to Spring B for the MS in Finance program.
- Added course descriptions for GBA 407 and GBA 408.