CONTENTS

Introduction 3

CHAPTER 1 The Importance of Fundamentals 15

CHAPTER 2 Finding the Right Market Opportunities 37

CHAPTER 3 Managing the Risk of Growth 51

CHAPTER 4 Choosing and Competing Effectively in the Right Space 65

CHAPTER 5 Targeting the Right Customers in the Right Space with the Right Offering 81

CHAPTER 6 Understanding Your Customers in the Right Space 115

CHAPTER 7 Vertical Incentive Alignment and Asset Specificity 137

CHAPTER 8 Setting Tactics in Today's Environment 153

CHAPTER 9 What Is So Different about Today? Conclusions and Lessons for the Future 177

Notes 193

Index 205