COURSE OBJECTIVE

This course builds upon material covered in Commerce 2MA3 - Introduction to Marketing. It relies on practical, real world case studies to develop your marketing decision-making skills, and your ability to analyse the business environment in which organisations operate. A major field project, which has student teams working with companies, is a critical part of this course.

INSTRUCTOR AND CONTACT INFORMATION

Sec 08: Monday 2:30 - 3:20 (DSB/B107) / Wednesday 2:30 - 4:20 (DSB/B107)

Prof. Manish Kacker
mkacker@mcmaster.ca
Office: DSB #202
Office Hours: Wed 10 a.m. – 11 a.m.
and by appointment
Tel: (905) 525-9140 x 21658

TA
Anna Sadovnikova
sadovna@mcmaster.ca
Office: DSB/231
Office Hours: Monday 1 – 2 p.m.

Course Website: Avenue to Learn (http://avenue.mcmaster.ca). Please check the course website daily for announcements and content.

COURSE ELEMENTS

<table>
<thead>
<tr>
<th>Credit Value:</th>
<th>3</th>
<th>Leadership:</th>
<th>Yes</th>
<th>IT skills:</th>
<th>No</th>
<th>Global view:</th>
<th>Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avenue:</td>
<td>Yes</td>
<td>Ethics:</td>
<td>Yes</td>
<td>Numeracy:</td>
<td>Yes</td>
<td>Written skills:</td>
<td>Yes</td>
</tr>
<tr>
<td>Participation:</td>
<td>Yes</td>
<td>Innovation:</td>
<td>Yes</td>
<td>Group work:</td>
<td>Yes</td>
<td>Oral skills:</td>
<td>Yes</td>
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<tr>
<td>Evidence-based:</td>
<td>Yes</td>
<td>Experiential:</td>
<td>Yes</td>
<td>Final Exam:</td>
<td>No</td>
<td>Guest speaker(s):</td>
<td>No</td>
</tr>
</tbody>
</table>
COURSE DESCRIPTION

The purpose of this course is to explore practical applications of marketing concepts in business situations. Case studies are used to give practice in analyzing opportunities, solving marketing issues, and preparing implementation plans. This course is taught primarily through the case-method but might also include readings, lectures, videos, workshops and assignments.

LEARNING OUTCOMES

The course will help you to:

1) Understand the application of basic marketing concepts;
2) Develop basic skills in marketing analysis, decision and strategy formulation;
3) Test your skills in communicating analysis, conclusions, and recommendations; and
4) Understand the environmental, global, and ethical dimensions of marketing decision making given the dynamics of business markets and customer needs.

REQUIRED COURSE MATERIALS AND READINGS

- Custom Courseware for the Section
  - Purchase a copy at the bookstore. Please buy the version specific to Prof. Kacker.
- Additional Materials
  - Handouts and other readings distributed in class, via email and/or the course website and Twitter page (http://twitter.com/MktgNewsFeed).

EVALUATION

Components and Weights

A. Class Participation and Contribution 20%
B. Hand-In Case Completed by the Group 20%
C. Industry Project Completed by the Group 60%
   i) In-class First Oral Presentation 10%
   ii) Interim Report on Industry Project 5%
   iii) In-class Final Oral Presentation 15%
   iv) Final Marketing Plan for Industry Project 30%

TOTAL: 100%
Conversion

At the end of the course, your overall percentage grade will be converted to your letter grade in accordance with the following Commerce grade conversion scheme:

<table>
<thead>
<tr>
<th>LETTER GRADE</th>
<th>PERCENT</th>
<th>LETTER GRADE</th>
<th>PERCENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>A+</td>
<td>90 - 100</td>
<td>C+</td>
<td>67 - 69</td>
</tr>
<tr>
<td>A</td>
<td>85 - 89</td>
<td>C</td>
<td>63 - 66</td>
</tr>
<tr>
<td>A-</td>
<td>80 - 84</td>
<td>C-</td>
<td>60 - 62</td>
</tr>
<tr>
<td>B+</td>
<td>77 - 79</td>
<td>D+</td>
<td>57 - 59</td>
</tr>
<tr>
<td>B</td>
<td>73 - 76</td>
<td>D</td>
<td>53 - 56</td>
</tr>
<tr>
<td>B-</td>
<td>70 - 72</td>
<td>D-</td>
<td>50 - 52</td>
</tr>
<tr>
<td>F</td>
<td>00 – 49</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Communication and Feedback

Students who are uncomfortable in directly approaching an instructor regarding a course concern may send a confidential email to the respective Area Chair (TBA) or the Associate Dean (adbusac@mcmaster.ca).

Students who wish to correspond with instructors or TAs directly via email must send messages that originate from their official McMaster University email account. This protects the confidentiality and sensitivity of information as well as confirms the identity of the student. Emails regarding course issues should NOT be sent to the Area Administrative Assistants.

Instructors are required to provide evaluation feedback for at least 10% of the final grade to students prior to Week #8 in the term.

Instructors may conduct an informal course review with students by Week #4 to allow time for modifications in curriculum delivery.

Students who wish to have a course component re-evaluated must complete the following form:

http://www.mcmaster.ca/policy/Students-AcademicStudies/Form_A.pdf

In order for the component to be re-read:
- the component must be worth 10% or more of the final grade in the course.
- students pay a fee of $50 in Gilmour Hall #209 (receipt is then brought to APO).
- the Area Chair will seek out an independent adjudicator to re-grade the component.
- an adjustment to the grade for the component will be made if a grade change of three points or greater on the 12 point scale (equivalent to 10 marks out of 100) has been suggested by the adjudicator as assigned by the Area Chair.
- if a grade change is made, the student fee will be refunded.
A. CLASS PARTICIPATION AND CONTRIBUTION (20%)

Marketing is not a spectator sport. You learn more by doing than by watching. A highly interactive environment stimulates idea generation, enhances communication skills, improves analytical processes, fosters collaborative networks, tests assumptions, and in general makes learning a fun experience! This is also the time and place to develop the assertiveness and communication skills that are necessary for success in business. Consequently, we value and reward contributions to in-class case analyses, exercises, presentations and discussions. For our class, this means:

- Being prepared for class discussion – reading the case carefully and completing any assignment before the class;
- Offering case analyses in a critical and constructive manner;
- Being eager / willing to debate issues using logic and integrating knowledge of basic marketing concepts;
- Listening and constructively reacting to comments made by other students;
- Communicating clearly (i.e., quantity of dialogue is not the same as quality);
- Demonstrating initiative to bring new and relevant knowledge to case / class discussion;
- Active participation in completing class exercises and assignments, which will include quantitative problems.

The key to high contribution grades is making quality contributions to every class discussion. Contributions to case discussions receive substantial importance, with the weight increased even further for case discussions in weeks 4, 6, 7, 9 and 10. The participation grades will map to an assessment of the quality of the contribution by the T.A./Professor. Participation marks will be posted on the course website on a regular basis. Please see me if your marks are low, or well before if you are concerned that they might be low. There are ways I can help you to participate more effectively. At the end of the semester, an overall participation grade will be given according to your participation marks in all classes.

Please note the following regarding Class Participation and Contribution:

- Please only attend class sessions for the section for which you are registered.

- Please display your name cards regularly in class. I will “cold call” on you during class sessions. If you do not feel adequately prepared and do not want to be called upon, please let me know at the beginning of class. My intention here is not to embarrass you, but rather to hear from you and incorporate your insights into the discussion.

- A photograph of the class will be taken during class. This photograph will be used by the TA and me to facilitate accurate recording of your participation.

- I expect you to be punctual. When you arrive late, your action disrupts the class. Please do not leave the classroom in the middle of class for a few minutes and then return; this also is disruptive.
• When you are present in class, all cell phones and tablets should be turned off unless I am notified prior to class of a possible personal emergency requiring them to be on.

• Reading newspapers or magazines in class, sending or reading text messages/email in class, or using your cell phone or computer for activities other than those related to the day’s class, is not permitted. These activities not only impede your learning but also distract and reduce the value gained by your classmates from the course and therefore constitute “negative class participation”.

• I expect you to treat me, your TA and your fellow students with respect and in a professional manner at all times.

• Absence from class is a serious matter, since you obviously can’t participate if you’re not there. If there are legitimate reasons for you to miss class, you need to follow procedures stipulated in the section ‘REQUESTS FOR RELIEF FOR MISSED ACADEMIC TERM WORK.’ No marks are awarded for attendance. However, absences may be penalized.

GROUP WORK
Groups will consist of five people (some exceptions may be made by the instructor, given the overall class size). All members should be registered for the same section to facilitate the group activities planned in the first few weeks.

NOTICE OF INTENT / GROUP SIGN-UP FORM

Please complete the last page of this outline and submit it by 4.30 p.m. on Wednesday, January 15th to Prof. Kacker in DSB 202.

PEER EVALUATIONS

80% of your mark in this course is team-based, so choose your fellow group members wisely. To encourage equal contribution, peer evaluation will be used to assess each member’s work. Groups are encouraged to set some ground rules and expectations early in the term and to have a short feedback session following the completion of each assignment so that individuals are made aware if their input is less than expected by their team.

The following deadlines regarding the peer evaluations need to be followed, unless the professor instructs you otherwise:

- An interim peer evaluation form (attached to this outline) is to be submitted by 4.30 p.m. on Friday, March 7 to Prof. Kacker in DSB 202.
- A final peer evaluation form (attached to this outline) will be submitted by 4.30 p.m. on Friday, April 11, with the completed Marketing Plan.
These two evaluations need only be submitted if the distribution is not equal, and must be signed by all in the presence of the instructor or a confirmation sent by each member using their McMaster email account. (If you fail to do so, the professor will assign your evaluation marks as per his discretion based on information at his disposal.)

The result of this process is a true reflection of each group members’ contribution to the project. You will be expected to resolve any residual conflict using the principle of fairness. Some members (i.e., those that contribute the most to the process) may find that their overall grade will go up as a result of the peer evaluation. Others may find that their overall project grade will go down. We recommend that this reward system be discussed during the first group meeting.

Past experience with groups has shown that most troubles arise because (a) individuals do not respect the group process, (b) there is lack of proper communication among group members and (c) group members have incompatible schedules for meeting outside of class hours. The first group meeting should happen in the first two weeks. At this meeting, you might want to:

- choose a group coordinator who will facilitate the work.
- set the parameters for group work such as: when the group will meet, attendance at group meetings including punctuality, and preliminary assignment of tasks.
- make a calendar of all “good” and “bad” times for the group (i.e., when group members have commitments to work, tests, major assignments, social commitments, holidays, etc.). The worst thing you can do is surprise your group with a long-standing commitment at the last minute.

**B. HAND-IN CASE (20%)**

Case: TREMCO.

DUE: FEBRUARY 10, 2014 (MONDAY) BY 9:00 a.m. BY UPLOAD TO THE COURSE WEBSITE.

**IMPORTANT:** Unless the professor instructs you otherwise, the format/structure of the hand-in case is detailed in a later Appendix titled: FORMAT OF HAND-IN CASE WRITE-UP.

Your case should be no more than ten pages plus any appendices that you choose to include. Appendices consist of information that supports the body of your report but is too detailed or voluminous to include in the body. This is where any detailed strategic domain analysis, financial analysis, segmentation grids, decision matrices should be housed. Appendices not referenced in the body of the report will not be marked.

The outcome of a good marketing case analysis and report is a marketing program that addresses the major and minor issues reported in the case.
C. MARKETING PLAN (60%)

Each group of students will work with a “client” who needs a marketing plan completed. Students are strongly encouraged to develop their own leads. We also hope to have identified a number of businesses that would like to work with a group to complete a plan. In either case, you will need the professor’s approval for your proposed project.

There are four group assignments for this: two presentations, one interim report and the final marketing plan.

Group Presentations (10% + 15%):
All group members must participate in the presentations. The presentations and resulting discussion period are an opportunity for you to receive feedback from the entire class prior to either continuing with the marketing plan development or submitting the plan to the client and the professor. All students must attend the presentations. Unexcused absences will be penalized. The two presentations will be made using the overhead projector or video/data projector available in class.

First (Interim) Presentation (10%)
DUE: WEEK 8. ORDER OF PRESENTATIONS TO BE DECIDED.
During the first presentation, the group will present background information about the client and its current marketing practices along with an overview on competition. Unless decided otherwise by the Professor, the presentation will be timed and will not exceed 15 minutes for the interim presentation (including discussion or Q & A). All groups will submit an electronic copy of the presentation before the first group makes its presentation.

Final Presentation (15%)
DUE: WEEKS 11, 12 AND 13. ORDER OF PRESENTATIONS TO BE DECIDED.
The final presentation will consist of a formal presentation of the marketing plan to the entire class (and perhaps the client). Unless decided otherwise by the Professor, each presentation will be timed and will not exceed 25 minutes for the final presentation (additional ten minutes will be kept aside after each presentation for Q & A / discussion or critique). All groups will submit an electronic copy of the presentation before the first group makes its presentation.

IMPORTANT: Unless the professor instructs you otherwise, relevant details of the presentations are given in a later Appendix titled: GROUP PRESENTATION DETAILS.
**Interim Report (5%)**:  
DUE: MARCH 7, 2014 (FRIDAY) BY 4:30 pm BY UPLOAD TO COURSE WEBSITE.  
You are also required to submit a five page Interim Report to receive early feedback on the marketing audit completed for this client – case format guidelines will apply.  

**IMPORTANT:** Unless the professor instructs you otherwise, relevant details of the interim report are given in a later Appendix titled: INTERIM REPORT DETAILS.

**Final Report (30%)**:  
DUE: APRIL 11, 2014 (FRIDAY) BY 4:30 pm IN DROPBOX OUTSIDE DSB-203. TWO HARD COPIES OR ONE HARD COPY AND ONE DIGITAL COPY (DIGITAL COPY SUBMITTED BY UPLOAD TO COURSE WEBSITE).  

**IMPORTANT:** Unless the professor instructs you otherwise, the format/structure of the hand-in case is detailed in a later Appendix titled: MARKETING PLAN STRUCTURE.  

Students must submit a marketing plan that is well organised, well written, accurate, and complete in its analysis. Clarity and conciseness are important. First class marketing plans contain: no grammatical errors, no spelling errors and no uncorrected typographical errors. You must submit one spiral bound hard copy for me to mail to the business. The second copy, to be used for evaluation, can either be a stapled hard copy or a digital document.  

The marketing plan written in this course is expected to have met the same high standards as a plan prepared for the management of a major company. Remember, these marketing plans are written to aid management in making a decision leading to the implementation of a particular strategy. The managers in question are familiar with the facts of the case and probably have an idea of the various alternatives that should be considered. Your marketing plan should not merely repeat existing knowledge. It should develop the information on opportunities and constraints in a manner that illustrates the depth of your understanding of the issues and reassures your reader that reasonable alternative strategies have been considered. It should convince the reader that the chosen solution is the appropriate one.  

Providing the written plan is a very different task from the analysis that must precede it. In most instances, the same framework employed in your analysis cannot be used for your plan. The purpose of the framework for analysis was a problem solving structure while the purpose of your written plan is the communication of your results. Also, the marketing plan is written for a particular purpose and person. The style of presentation, language usage and organisation should be suitable for that purpose and person. Do not write the marketing plan to your instructor but to your client. Business writing differs from expositional, literary writing in that it is more action oriented and provides an account of an opinion or decision. Your marketing plan is not an essay or interpretative literary composition; its purpose is to inform and persuade. Students may find that they are required to assume a more reportorial, analytical, objective voice and style of writing.
Note:
1. Avoid emotional, subjective, or vague words.
2. Detail is extremely important.
4. Link up STP and 4P’s to analysis and solutions to problems.

**ACADEMIC DISHONESTY**

It is the student’s responsibility to understand what constitutes academic dishonesty. Please refer to the University Senate Academic Integrity Policy at the following URL:


This policy describes the responsibilities, procedures, and guidelines for students and faculty should a case of academic dishonesty arise. Academic dishonesty is defined as to knowingly act or fail to act in a way that results or could result in unearned academic credit or advantage. Please refer to the policy for a list of examples. The policy also provides faculty with procedures to follow in cases of academic dishonesty as well as general guidelines for penalties. For further information related to the policy, please refer to the Office of Academic Integrity at:

[http://www.mcmaster.ca/academicintegrity](http://www.mcmaster.ca/academicintegrity)

**REQUESTS FOR RELIEF FOR MISSED ACADEMIC TERM WORK**

1. Students may request relief from a regularly scheduled midterm, test, assignment or other course component in the following ways:

   a) for absences from classes lasting up to five (5) days; or
   b) for absences from classes lasting more than five (5) days.
   c) for conflicts arising from Faculty Office approved events

   a) For absences from classes lasting up to five (5) days
   Students must use the MSAF (McMaster Student Absence Form). This is an on-line, self-reporting tool, for which submission of medical or other types of supporting documentation is normally not required. Students may use this tool to submit a maximum of one (1) request for relief of missed academic work per term as long as the weighting of the component is worth 29% of the final grade or less. Students must follow up with their course instructors regarding the nature of the relief within two days of submitting the form. Failure to do so may negate the opportunity for relief. It is the prerogative of the instructor of the course to determine the appropriate relief for missed term work in his/her course.

   If the value of the component is worth 30% or more, students must report to their Faculty Office (the APO for Commerce students) to discuss their situation and will be required to provide appropriate supporting documentation.
b) For absences from classes lasting more than five (5) days
Students cannot use the MSAF. They MUST report to their Faculty Office (the APO for Commerce students) to discuss their situation and will be required to provide appropriate supporting documentation.

Students who wish to submit more than one request for relief of missed academic work per term cannot use the MSAF. They must report to the APO and discuss their situation with an academic advisor. They will be required to provide supporting documentation and possibly meet with the Manager.

c) For conflicts arising from Faculty Office approved events

Students unable to write a mid-term at the posted exam time due to the following reasons: religious; work-related (for part-time students only); representing university at an academic or varsity athletic event; conflicts between two overlapping scheduled mid-term exams; or other extenuating circumstances, have the option of applying for special exam arrangements. Please see the DeGroote Missed Course Work Policy for a list of conflicts that qualify for academic accommodation
http://ug.degroote.mcmaster.ca/forms-and-resources/missed-course-work-policy/

Such requests must be made to the Academic Programs Office at least ten (10) working days before the scheduled exam along with acceptable documentation.
Non-Commerce students must submit their documentation to their own Faculty Office and then alert the Academic Programs Office of their interest in an alternate sitting of the midterm.

Instructors cannot themselves allow students to unofficially write make-up exams/tests. Adjudication of the request must be handled by the Academic Programs Office.

The MSAF cannot be used during any final examination period.

If a mid-term exam is missed without a valid reason, students will receive a grade of zero (0) for that component.

**Student Accessibility Services**

Student Accessibility Services (SAS) offers various support services for students with disabilities. Students are required to inform SAS of accommodation needs for course work at the outset of term. Students must forward a copy of such SAS accommodation to the instructor normally, within the first three (3) weeks of classes by setting up an appointment with the instructor. If a student with a disability chooses NOT to take advantage of an SAS accommodation and chooses to sit for a regular exam, a petition for relief may not be filed after the examination is complete. The SAS website is:

http://sas.mcmaster.ca
**POTENTIAL MODIFICATIONS TO THE COURSE**

The instructor and university reserve the right to modify elements of the course during the term. The university may change the dates and deadlines for any or all courses in extreme circumstances. If either type of modification becomes necessary, reasonable notice and communication with the students will be given with explanation and the opportunity to comment on changes. It is the responsibility of the student to check their McMaster email and course websites daily during the term and to note any changes.

**RESEARCH USING HUMAN SUBJECTS**

Research involving human participants is premised on a fundamental moral commitment to advancing human welfare, knowledge and understanding. As a research intensive institution, McMaster University shares this commitment in its promotion of responsible research. The fundamental imperative of research involving human participation is respect for human dignity and well-being. To this end, the University endorses the ethical principles cited in the Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans:


McMaster University has mandated its Research Ethics Boards to ensure that all research investigations involving human participants are in compliance with the Tri-Council Policy Statement. The University is committed, through its Research Ethics Boards, to assisting the research community in identifying and addressing ethical issues inherent in research, recognizing that all members of the University share a commitment to maintaining the highest possible standards in research involving humans.

If you are conducting original research, it is vital that you behave in an ethical manner. For example, everyone you speak to must be made aware of your reasons for eliciting their responses and consent to providing information. Furthermore, you must ensure everyone understands that participation is entirely voluntary. Please refer to the following website for more information about McMaster University’s research ethics guidelines:

[http://reo.mcmaster.ca/](http://reo.mcmaster.ca/)

Organizations that you are working with are likely to prefer that some information be treated as confidential. Ensure that you clarify the status of all information that you receive from your client. You **MUST** respect this request and cannot present this information in class or communicate it in any form, nor can you discuss it outside your group. Furthermore, you must continue to respect this confidentiality even after the course is over.
A NOTE ON GRADING

The evaluation to determine a grade is based on the quality of the submission. There is a bit of subjectivity in this evaluation as with most evaluations in social sciences. However, our experience indicates that there is a "standard" answer that defines the relevant concepts, makes a logical argument, and uses relevant examples where required. For problem solving, the “standard” answer involves identifying the issues, analyzing the facts and making relevant recommendations. Generally, this type of submission demonstrates basic understanding of course material and deserves a B. Submissions that demonstrate unique insights and provide a comprehensive understanding of the concepts/issues get rewarded accordingly with a B+, A-, A, A+. In determining the final grades, please keep in mind that submissions are evaluated absolutely and relatively. Reports are evaluated absolutely according to the requirements. Reports are also evaluated relative to one another.

FEEDBACK AND CONTACT

Your feedback is important for the success of this course. I will collect feedback directly from you on a periodic basis. Of course, the provision of feedback is not restricted to these formal mechanisms. Please feel free to stop by my office, give me a call, drop me a note or send e-mail to share your views, questions or concerns you may have regarding the course. I will routinely use e-mail to communicate with you about various course-related issues. I check e-mail every day and generally respond to them within 24 hours.

SUBMISSION DEADLINES

The following are the deadlines for submission of materials for this course. Late submissions will receive a ZERO. Viruses, printer problems, file or disc problems, traffic, weather, etc. are wonderful reasons why one should build “slack” into any project schedule. Successful businesses and business people plan to avoid or prevent these things.

<table>
<thead>
<tr>
<th>Item</th>
<th>Date</th>
<th>Time</th>
<th>Submission format</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Signup Form</td>
<td>Jan 15, 2014</td>
<td>4.30 p.m.</td>
<td>Email or hard copy to Professor.</td>
</tr>
<tr>
<td>Hand-in Case</td>
<td>Feb 10, 2014</td>
<td>9 a.m.</td>
<td>Upload to course website.</td>
</tr>
<tr>
<td>Interim Peer Evals (optional)</td>
<td>Mar 7, 2014</td>
<td>4.30 p.m.</td>
<td>Hard copy to Professor.</td>
</tr>
<tr>
<td>Final Marketing Plan</td>
<td>Apr 11, 2014</td>
<td>4.30 p.m.</td>
<td>Dropbox outside DSB 203. Two hard copies or one hard copy and one digital copy.</td>
</tr>
<tr>
<td>Final Peer Evals (optional)</td>
<td>Apr 11, 2014</td>
<td>4.30 p.m.</td>
<td>Hard copy to Professor.</td>
</tr>
</tbody>
</table>
# Course Schedule – Section C08

<table>
<thead>
<tr>
<th>Week</th>
<th>Monday 2:30 to 3:20</th>
<th>Wednesday 2:30 to 4:20</th>
</tr>
</thead>
<tbody>
<tr>
<td>1: January 6</td>
<td>Jan 6</td>
<td>Jan 8</td>
</tr>
<tr>
<td></td>
<td>* Course outline handed out</td>
<td>* Overview of assignments and presentations.</td>
</tr>
<tr>
<td></td>
<td>* Name-cards</td>
<td>* Format for case discussions.</td>
</tr>
<tr>
<td></td>
<td>* Fill out information sheet.</td>
<td>* Preliminary discussions on marketing concepts and methods for case discussion.</td>
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<tr>
<td></td>
<td>* Discuss elements of course, market dist; group format</td>
<td>* Exploring ideas for industry project</td>
</tr>
<tr>
<td>2: January 13</td>
<td>Jan 13</td>
<td>Jan 15</td>
</tr>
<tr>
<td></td>
<td>* Group process exercise – roles and rules</td>
<td>Jan 15</td>
</tr>
<tr>
<td></td>
<td>* Discuss format for marketing plan reports</td>
<td>Case: Limelight Cinema (Introductory case)</td>
</tr>
<tr>
<td>3: January 20</td>
<td>Jan 20</td>
<td>Jan 22</td>
</tr>
<tr>
<td></td>
<td>* Review past reports as a group</td>
<td>Case: Goof Proof Car Battery Boosting System</td>
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<tr>
<td></td>
<td>* Finalize work plan for term project; responsibilities, timelines</td>
<td>(Segmentation, targeting and positioning case)</td>
</tr>
<tr>
<td>4: January 27</td>
<td>Jan 27</td>
<td>Jan 29</td>
</tr>
<tr>
<td></td>
<td>Current topics in marketing: Segmentation and Targeting</td>
<td>Case: Pillsbury Cookie Challenge</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(Segmentation, targeting and positioning case)</td>
</tr>
<tr>
<td>5: February 3</td>
<td>Feb 3</td>
<td>Feb 5</td>
</tr>
<tr>
<td></td>
<td>Current topics in marketing: Positioning and Branding</td>
<td>Current topics in marketing – Promotion Strategy</td>
</tr>
<tr>
<td>6: February 10</td>
<td>Feb 10</td>
<td>Feb 12</td>
</tr>
<tr>
<td></td>
<td>* Research Ethics</td>
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<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Spring Break</td>
</tr>
<tr>
<td>7: February 24</td>
<td>Feb 24</td>
<td>Feb 26</td>
</tr>
<tr>
<td></td>
<td>Current topics in marketing: Pricing Strategy</td>
<td>Case: Natureview Farm (Distribution strategy case)</td>
</tr>
</tbody>
</table>

**Hand-in Case is due by 9 AM on Feb 10.**
## Course Schedule – Section C08 (Continued)

<table>
<thead>
<tr>
<th>Week</th>
<th>Monday 2:30 to 3:20</th>
<th>Wednesday 2:30 to 4:20</th>
</tr>
</thead>
<tbody>
<tr>
<td>8: March 3</td>
<td><strong>INTERIM REPORT IS DUE BY 4:30 PM ON MAR 7.</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Mar 3 INTERIM PRESENTATIONS</td>
<td>Mar 5 INTERIM PRESENTATIONS</td>
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<tr>
<td>9: March 10</td>
<td>Mar 10 CURRENT TOPICS IN MARKETING: DISTRIBUTION STRATEGY</td>
<td>Mar 12 CURRENT TOPICS IN MARKETING: DISTRIBUTION STRATEGY</td>
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<td>10: March 17</td>
<td>Mar 17 CURRENT TOPICS IN MARKETING: PRODUCT STRATEGY</td>
<td>Mar 19 CURRENT TOPICS IN MARKETING: PRODUCT STRATEGY</td>
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<td>Mar 19 CASE: MOUNTAIN MAN BREWING CO.: BRINGING THE BRAND TO LIGHT (PRODUCT STRATEGY CASE)</td>
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<td>11: March 24</td>
<td>Mar 24 CURRENT TOPICS IN MARKETING: MARKETING STRATEGY</td>
<td>Mar 26 FINAL PRESENTATIONS</td>
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<td>12: March 31</td>
<td>Mar 31 FINAL PRESENTATIONS</td>
<td>APRIL 2 FINAL PRESENTATIONS</td>
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<td>13: April 7</td>
<td>APR 7 FINAL PRESENTATIONS</td>
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**Final Report Due: April 11, by 4:30 PM**

**IMPORTANT NOTE:** The above schedule is to be considered tentative and can be changed by the professor during the semester. You will be given advance notice if such a change is made.
GROUP WORK FOR FIRST TWO WEEKS

Weeks 1 and 2 (T.A./Prof)
- Meet with potential group members;
- Discuss individual strengths and weaknesses;
- Exchange contacts;
- Create a list of at least three firms as potential group project clients that you will follow up with;
- Discuss the strengths and weaknesses of each firm as your potential project;
- Decide on follow up tasks for each project opportunity. The information you collect will help in the discussions next week
- At the end of class, each individual turns in a list of potential group members and the project opportunities discussed. This is not yet official but serves as a record of your deliberations.
- The group signup form due later is official.

Note: You are expected to a fair bit of work among yourselves to be in a position to form a group by the next week’s deadline. This would require you to take a proactive role in making contacts and networking on your own even outside the classroom. Given the time pressure your ability to be in a group as per your preference may be limited. However, it is only rarely that you would have much control on the composition of your work group in real life. So, part of the challenge is also to be able to work with the randomness that comes with this process. Conflicts are as much part of working in a group, as are moments of agreements. Your group experience is a success if the net of happiness less unhappiness caused by the group process, is positive. But it is also about getting a job done. So, keep an open mind, adapt as necessary and be fair in your expectations of others as well as yourself.

Weeks 3 and 4 (T.A./Prof)
Group Work
- Finalize your group
- Discuss management of group process – Communications, Disputes, Expectations, Penalties, Incentives
- Discuss strengths and weaknesses of the project opportunities identified earlier and following your investigations over the week
- Narrow down project choices from three to one
- Decide on how to follow up and contacting the firm for project
- By the end of Week 4, each group should submit an email describing the project they will be working on and why it was chosen (maximum one page).
APPENDIX
FORMAT OF HAND-IN CASE WRITE-UP

Your case should be no more than ten pages (double spaced, 1 inch margins) plus any appendices that you choose to include. Appendices consist of information that supports the body of your report but is too detailed or voluminous to include in the body. This is where any detailed strategic domain analysis, financial analysis, segmentation grids, decision matrices should be housed. Appendices not referenced in the body of the report will not be marked. There are no limits to appendices. Follow the structure given below:

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<thead>
<tr>
<th>Section</th>
<th>Contents</th>
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<tr>
<td>Title Page</td>
<td>Title of case, date, Group Number and names / student numbers of team members</td>
<td>About 1%</td>
</tr>
<tr>
<td>Table of Contents</td>
<td>Major sections of paper, exhibits</td>
<td>About 1%</td>
</tr>
<tr>
<td>Introduction, Problem/Issue Identification, Summary of solution</td>
<td>Answer the question “This case is about….” in one short, concise paragraph. The focus may be on an evident marketing / business problem or an opportunity. Your perception of the problem may be different from that of “players” in the case. All following sections should be analysed in context of the problem / challenge. Offer a summary of your strategy with a statement “We suggest that to address the (problem/issue), the firm should …”</td>
<td>About 4%</td>
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<tr>
<td>Marketing Audit</td>
<td>An audit incorporates the identification of current marketing practices i.e. Current STP Strategy (Market Segmentation, Targeting, and Positioning) as well as tactics (in terms of 4P’s). Some of the strategies may not be evident but can be inferred. OFFER A SUMMARY OF THE MOST RELEVANT ASPECTS OF THE AUDIT IN THIS SECTION, USING APPROPRIATE SUB-HEADINGS. Remember that the reader knows the case, but may not have processed all information. So while simply regurgitating information will not be useful, identifying the relevance of the information to the task at hand is of value. For details that may be only marginally relevant, use the appendix.</td>
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<td>Strategic Domain Analysis (4C+1 and SWOT - Internal and External Analysis)</td>
<td>Critical analysis of the key components of the firm’s strategic domain. A detailed 4C+1 analyses should be followed by the identification of the key Strengths, Weakness, Opportunity and Threats (SWOT). Organise all information in the 4C+1 framework. Use sub-heading for each of the 4C+1. This can be in the Appendix. Use subheadings for each of Strengths, Weaknesses, Opportunities and Threats to discuss the SWOT. This will be in the body of the paper. Must link to the 4C+1 analysis. Remember that SW are internal factors (often under the management’s control), and OT are external. All information should be taken only from the case and discussed using the “So what?” argument – giving the implication on the problem / challenge. Thorough analysis of external environment – identification of opportunities and threats given the Social / Cultural trends; Demographic Trends; Economic, Political, Legal or Technological Influences etc (focus only on what is presented in the case – do not undertake any external research). Use “So what?” to argue implications for firm or the problem at hand. Quantitative analysis of financial information (break evens, profitability etc). Show these in the Appendix and incorporate summary in the SWOT.</td>
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| Marketing Strategy (two alternatives) | • You may also find that several characteristics can be grouped. For instance you might suggest that a firm is “innovative” because it launches new products every year; invests in new technologies and invests significantly in R & D.  
• Focus on SW or OT most important to problem and goals  
• Note: If you find yourself writing, “The company has the opportunity to …”, you have identified an alternative not an opportunity. A controllable issue is not part of the external environment. | About 25%   |
| Implementation Plan             | • Clear, detailed marketing strategy and mix for each alternative – STP and 4P’s  
• Use of relevant marketing tools to support alternatives  
• Direct link between alternatives and analysis of current marketing situation / opportunities / threats. Discussion of pros and cons.  
• IDENTIFY ONE OF THE TWO STRATEGIES AS THE ONE YOU RECOMMEND. DISCUSS REASONS FOR CHOOSING THIS OVER THE OTHER ALTERNATIVE | About 8%    |
| Bibliography                     | • Use the Citation Guide, if provided in the courseware pack  
• Only necessary if you use material from outside the case. The contents of the case need not be referenced. | About 1%    |
| Case Assignment Format Guidelines | • Ten Pages not including title page, table of contents, reference and appendices (core elements of the case like the relevant 4P’s and SWOT must be in the body – see above)  
• Typed using a font size of twelve, double-spaced and with one-inch margins all around.  
• Good grammar and spelling – whole numbers ten or less should be written in words. | About 4%    |

(*) These numbers are meant only to give you an approximate idea of the relative weights of the different sections of your report for evaluation purposes. All parts of the report should be related to and support each other – the marketing strategy and implementation plan should address the identified marketing problem, based on the marketing audit and strategic domain analysis. Understand that the report is always considered as a whole, for evaluation. Therefore, such factors as whether your report is convincing, logical in its arguments and segues, exhibits marketing insights and maturity etc. are extremely important in determining your final marks.
APPENDIX
GROUP PRESENTATION DETAILS

First (Interim) Presentation (10%)
15 minutes (including discussion or Q & A unless decided otherwise by the Professor)
1. Intro to Company: owner; team; business history; milestones.
2. NAICS / SIC code – comment on size of industry and significant number trends.
3. Current Marketing Situation: STP, 4P’s, Current customer characteristics.
4. Partial analysis of strategic domain: Strengths and Weaknesses for the Company domain and Opportunities and Threats for the Consumer domain.
5. Business Problem/Challenge: Quantify. Discuss root cause in marketing practices, using some theory; Goals / Objectives – Quantitative; establish basis.

Final Presentation (15%):
25 minutes (additional ten minutes will be kept aside for Q & A / discussion or critique)
1. Brief but complete overview of the first presentation, with an emphasis on marketing audit and SWOT done previously.
2. Customer decision process as applied to your context. Discuss decision making unit, Discuss sources of customer value, key decision criteria, unmet customer needs. Implications for market segmentation as well as opportunities and threats in the consumer domain. Provide insights.
3. Analysis of other elements of the strategic domain. Focus on the significant elements pertaining to your plan. Opportunities and threats identified from secondary data/number trends should be included.
   - Competitive Environment – Primary / Secondary Competitors; Aggressiveness.
   - Collaborators, if relevant – upstream/downstream channel members, alliances, relationships, contracts, trust.
   - Context – analyse external environment: Current and estimates of future demand. Relate to Industry trends. Relate to Social / Cultural, Demographic, Economic, Political / Legal and Technological environment. It is not necessary to include opportunities and threats from every single environment that forms the context. Focus on the ones that are the most relevant to your organization.
4. Explain the revised Business Problem/Objectives and bases of revision. Problem defined in terms of performance metrics and underlying root causes. Objectives/goals created using the SMART approach - specific, measurable, actionable, realistic, time bound. Explain what specific criteria you will use to evaluate alternative strategies.
5. Elaborate on your Marketing Strategy alternatives, recommendations, rationale and implementation. Evaluate both alternatives comprehensively. Provide a clear rationale both alternatives as well as for selecting one over the other. No obviously flawed alternatives are presented. Alternatives are mutually exclusive. Implementation covers what is to be done, when, and by whom. A good marketing strategy:
   - Meets goals and solves the business problem.
   - Uses marketing concepts well.
   - Leverages strengths and opportunities and overcomes threats and weaknesses.
Important notes on final presentation

- The Final Presentation is a formal event. Your marks will also depend on the professionalism you display.
- You have a short time to convey your ideas, make an impact and convince the audience of your solution. So, you will have to both hold their interest as well as make them understand the merits of your approach. Use your time wisely.
- There is no specific formula for success. It helps to practice beforehand and discuss as a group what needs to be improved upon. Making a video recording of the practice sessions and debriefing subsequently, often helps to identify areas of improvement.
- Keep in mind the presentation room infrastructure while you prepare.
- Group effort is essential. Being surprised by new material, however good that may be, presented by a group member in the final presentation will probably do you more harm than good if it is not relevant or complementary to the rest of your presentation.
- Every student enrolled in the class is required to attend the presentations whether their group is presenting or not. You are expected to maintain a strict and courteous decorum during the presentation, which includes being quiet and not distracting the presenters by walking in and out during the presentations or otherwise. Any actions to the contrary will be penalized.
- You are encouraged to invite your client to come to the event. You must inform the Professor at least TWO WEEKS before your presentation date of your intent to invite your client and get the Professor’s permission. Following this, you must confirm their attendance at least TWO DAYS before the date. In all circumstances, the Professor will have the final say on the attendance of a client.
APPENDIX
INTERIM REPORT DETAILS

Interim Report (5%):
Five pages. Case format guidelines apply.

1. Company History includes milestones, organizational structure, details of education or training and business / other experience of owners/managers, employees – numbers and expertise; recognition received etc.
2. NAICS / SIC code – comment on size of industry and significant number trends
3. Discuss Current Marketing Situation:
   a) Segmentation – How is the market segmented? What are the different distinct segments in the market? How large are they?
   b) Targeting – Answer the questions: ‘Who is the Current Customer?’ Where is the customer coming from – geographically? And more... How/why was this segment(s) selected for targeting?
   c) Positioning (have a basis) – How is the brand differentiated from the competition in the minds of the target customer? Discuss current branding, including positioning statements etc.
   d) Product - include lines, service elements, total SKU’s – best / worst sellers, sizes, packaging, store layout…
   e) Price - comment on strategy, trends …
   f) Promotion - include detailed spend on each element – mass media, flyers, direct sales, direct mail etc
   g) Place – channels used to reach consumers, including details about the relationships with intermediaries.
4. What is the customer decision making process and criteria? What customer need is satisfied by the company? What unmet needs do customers have?
5. What are the strengths and weaknesses of the company? What opportunities and threats are presented by consumers?
6. Business Problem (Quantify – discuss root cause); Objectives (SMART goals).
7. Attach samples of advertisements, brochures, packaging etc in appendix
APPENDIX
MARKETING PLAN STRUCTURE

The marketing plan has several sections.

TITLE PAGE
The first page is the title page and contains:
1. The name of the contact and organization including mailing address (centred on the page)
2. Team member names and student numbers, Group Number
3. Course and section number,
4. Instructor's name, and
5. The date.

LETTER OF COOPERATION
This letter must be obtained from the business, preferably on the company letterhead, and must confirm their willing participation in this process, and must acknowledge their awareness of the fact that the information they have shared will be used for case analysis in class and other academic purposes.

EXECUTIVE SUMMARY
This should include:
1. A concise statement of the problem.
2. A short summary of the major points arising from your analysis.
3. The major recommendations from your analysis including projected outcomes

Executive summaries should be a synthesis of the marketing plan, not just a point form version of the plan. The reader should be able to read this alone, and understand your analysis and decision. Thus, you cannot introduce new information into the Executive Summary. An Executive Summary is good practice for business marketing plans and the ability to summarise material is a skill that students must develop. The reader may find that the information contained in the summary section of the marketing plan is sufficient, or if he/she decides to read the complete marketing plan, find that the summary is preparation for the analysis that follows. The Executive Summary may be single-spaced. If the summary is longer than one page in length, it is too long.

COMPANY INTRODUCTION
The introduction prepares your reader for what is to follow. The introduction should begin with a backgrounder on the company, its owners, their goals and objectives, the industry sector classification etc. It should be no longer than one page.

MARKETING AUDIT
Offers full detail on the STP (segmentation, targeting and positioning) and 4P’s. Gives an insight into performance in different sectors, over time periods and highlights trends. ALL current marketing practices are detailed in this section but not critiqued.
STRATEGIC DOMAIN ANALYSIS
Marketing plans usually include some sort of “Situation Analysis.” It is important that you don't merely regurgitate facts in this section. The reader is only concerned with information that has implications for the problem or for the solution of the problem.

Discuss the strengths, weaknesses, opportunities and threats under each of the 4C+1 headings – Company, Customer, Collaborator, Competition and Context. You must comment on the implications of all of the strengths, weaknesses, opportunities and threats that you mention. The marketing plan reader shouldn't have to ask “So what?” after each point is raised. Summarise the key SW and OT that you discussed, at the end.

This section should be the bulk of your report and must include an estimate / analysis on size of market, discuss industry trends, use secondary research to highlight demand forecasts (for example: online purchases by Canadians are expected to exceed $24 billion by 2006 …reference).

When discussing the Consumer, make sure that you also map the decision making process, the decision making unit and value to your assessment of the SWOT. Your understanding of consumer needs and decision-making may help in identifying new ways to segment the market and identify attractive target segments with unmet needs.

When discussing Competitors, you must also identify the Primary / Secondary Competition (identify the 4P’s for each of your major competitors; focus on in depth analysis on the real threats do not create a list of all possible competitors). Relate this to your assessment of the opportunities and threats. You must offer a sound perspective on the marketing practices and strengths/weaknesses of two major competitors.

When discussing the Context, account for the opportunities and threats under the following headings - Social / Cultural Factors, Demographic Trends, Economic and Business Conditions, Political, Legal and Technological Issues.

REMEMBER A LOT OF SMALL BUSINESS OWNERS ARE WORKING WITH “GUT FEEL”. IT IS OUR RESPONSIBILITY TO EXPOSE THEM TO THE “FACTS” IN THE MARKETING ENVIRONMENT FOR THEIR PRODUCT OR SERVICE. THEREFORE FOCUS ON IDENTIFYING TRENDS AND DEVELOPING FORECASTS. GRAPH YOUR INFORMATION – USE PICTURES AND SAVE ON WORDS.

PROBLEM IDENTIFICATION
A formal problem statement is useful in furnishing your reader with some insight into your marketing plan. Be specific. Do not define or state a problem in vague terms or symptoms or alternative courses of action. USE FACTS.

Make sure that you clearly and explicitly outline the problem. Don't confuse symptoms with the underlying problem. Ask yourself “why?” after each problem statement that you generate; this should help in determining the underlying problem. For example, a weak problem statement would be “Market share is going down”. A better version will tell the reader the rate of decline as well as compare it to previous years and to industry trends. Importantly, there could be a many reasons why market share is going down, and thus many possible solutions – most of which will not be effective unless you know why market share is going down. Thus declining market share
is a symptom of an underlying problem and if you can correctly identify this problem half the battle is won.

*Do not state the problem as choosing from between a number of alternative strategies.*

**Objectives and Evaluation Criteria**

This part of the marketing plan will include a (i) list of specific and measurable business objectives (SMART goals) and (ii) criteria by which to evaluate your alternative solutions. It is important to provide clear rationale for your goals. Connect your objectives to the problem(s) you have previously identified.

**Strategy Alternatives and Recommendation**

This part of the marketing plan will include a discussion of two possible alternative solutions to the problem. When you discuss alternative solutions to the problem, keep in mind that your alternatives should solve the problems as stated at the beginning of your analysis. Make sure that you discuss changes in the marketing strategy (in terms of segmentation, targeting and positioning), the marketing mix (commenting on each of the 4P’s), and pros and cons of each alternative. Make sure you assess each alternative against your decision criteria. Remember, the alternatives must fit with the current resources of the organisation. They must also use the SWOT.

The marketing strategy you recommend must be justified. The logic of your selection of one alternative course of action over the others must be apparent. The decision must fit with the objectives, strategy and resources of the organisation. The decision must be feasible given the competitive environment. Discuss to whom are you selling and how will you distinguish your product from competition or talk about the competitive advantages your chosen strategy will provide. If you are planning on targeting multiple segments, how will you reconcile the fact that these segments may require different positioning approaches and/or different marketing mixes? Please comment on likely competitor reaction to your strategy.

**Implementation and Controls**

Include a guide for implementation. List specific action steps and include a time line. Indicate who is responsible for each step. Outline the controls that will be used to monitor progress and allow higher management to review implementation results.

**Budget**

Provide documentation to support costing on each strategy for example – include printing quotes, advertising rates etc. Also include supporting notes / financial justification for the recommended strategy. Growth projections based on the implementation of the recommended strategy must be included - it shows the “bottom-line” of the decision. Include worst/possible/best case scenarios. Ensure that the time period in your implementation match the time considerations in your objectives.

**Conclusion**

The report should include a brief conclusion, summarizing how the solution best solves the problem identified at the beginning of the report.
REPORT GUIDELINES
Please conform to the following:

4. Marketing plans should use readable fonts and numbered pages. Font size for the marketing plan body should not be smaller than 12 point. Left / right margins must be no smaller than 1 inch each.

5. Papers should be double-spaced and printed on one side of the paper only. The Executive Summary may be single-spaced.

6. The body of the report is not to exceed 35 pages. Import all industry trend findings and reference graphs into the main body of the report. This page limit does not include the title page, table of contents, bibliography or other appropriate appendices. Marketing plans exceeding the 35-page limit will be penalised 10 percent per page for every page past the limit.
INSTRUCTIONS:
1. Please assign each person in your group an amount of money which represents each individual's contribution to the project, simulation and hand-in cases. You may each wish to complete a form individually and then share these forms at a group meeting but only one form is to be submitted for each group and it must be signed by all group members.

2. Your total budget to distribute among the people in your group is $600 * (the number of people in your group). For example, if there are 5 people in your group, then pretend that you have $600 * 5 = $3,000 to pay to the group.

3. If everyone contributed equally, then pay each person $600.

4. Adjust the fee according to your honest personal assessment of the value of each person's contribution. Please attach documentation to support positive or negative peer evaluation – this should include dated records of early feedback given to team member(s).

5. The factor arrived at for each team member as a result of the peer evaluation will be applied to the group work in this course.

6. Treat this evaluation seriously. It will impact grades.

7. Make sure that the fees paid add to $600 * group size.

Professor

Group number:

Client organization:

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**COMMERC 3MC3 - APPLIED MARKETING MANAGEMENT**  
**INTERIM GROUP EVALUATION FORM**

**INSTRUCTIONS:**

1. Please assign each person in your group an amount of money that represents each individual's contribution to the project, and hand-in case. You may each wish to complete a form individually and then share these forms at a group meeting but only **ONE FORM** is to be submitted for each group, and it must be signed by all members.

2. Your total budget to distribute among the people in your group is $400 * (the number of people in your group). For example, if there are 5 people in your group, then pretend that you have $400 * 5 = $2,000 to pay to the group.

3. If everyone contributed equally, then pay each person $400.

4. Adjust the fee according to your honest personal assessment of the value of each person's contribution. RECORD, DATE AND SIGN YOUR FEEDBACK NOW FOR THE INTERIM EVALUATION.

5. The factor arrived at for each team member as a result of the peer evaluation will be applied to the group work in this course.

6. TREAT THIS EVALUATION SERIOUSLY.

7. MAKE SURE THAT THE FEES PAID ADD TO $400 * GROUP SIZE.

**PROFESSOR**                                               **GROUP NUMBER:**

**CLIENT ORGANIZATION:**

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COMMERCE 3MC3 - APPLIED MARKETING MANAGEMENT

Professor: Kacker

GROUP #: ___________  (To be assigned)

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COMPANY NAME

A) Briefly describe the product or service offered by your client. What consumer need or want does the client (presumably) attempt to satisfy?

______________________________________________________________________
______________________________________________________________________
______________________________________________________________________
______________________________________________________________________

B) Briefly describe the target market and key competitors.

______________________________________________________________________
______________________________________________________________________
______________________________________________________________________

C) Provide company contact name and phone number/email

______________________________________________________________________