Comerce 3MC3
APPLIED MARKETING MANAGEMENT
Fall 2014 Course Outline

Marketing Area
DeGroote School of Business
McMaster University

**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 C07: Tuesday 9:30 - 10:20 (KTH B124) / Friday 9:30 - 11:20 (KTH B124)

Dr. Ruhai Wu
wuruhai@mcmaster.ca
Professor
Office: DSB 214
Office Hours: Drop by my office anytime.
Tel: (905) 525-9140 x23048

Xiao Ling
lingx4@mcmaster.ca
Teaching Assistant
Office Hours: by appointment

**Course Elements**

<table>
<thead>
<tr>
<th>Credit Value</th>
<th>Leadership</th>
<th>Ethics</th>
<th>Innovation</th>
<th>Verbal skills</th>
<th>Numeracy</th>
<th>Political</th>
<th>Written skills</th>
<th>Team Work</th>
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**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;
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 available at the bookstore – The version specific to Dr. Ruhai Wu
- Additional Materials: In-class handouts and other readings posted on AVENUE to Learn (http://avenue.mcmaster.ca/). Please check the course website weekly.

EVALUATION

Components and Weights

A. Class Contribution 20%
B. Assignments 5%
C. Hand-In Case Completed by the Group 15%
D. Industry Project 60%
   - In-class First Oral Presentation 10%
   - Interim Report on Industry Project 10%
   - In-class Final Oral Presentation 10%
   - Final Marketing Plan for Industry Project 30%

TOTAL: 100%

Grade Conversion

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

<table>
<thead>
<tr>
<th>LETTER GRADE</th>
<th>PERCENT</th>
<th>LETTER GRADE</th>
<th>PERCENT</th>
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<tr>
<td>A+</td>
<td>90 - 100</td>
<td>C+</td>
<td>67 - 69</td>
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<td>85 - 89</td>
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<td>77 - 79</td>
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<td>73 - 76</td>
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<td>70 - 72</td>
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<td></td>
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<td>00 – 49</td>
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</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 (wuru hai@mcmaster.ca) 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

**Individual Work**

25% of your final grade is from your personal input, including class contribution score (20%) and assignment score (5%).

**Class Participation and Contribution (20%)**

You learn more by doing than by watching. A highly interactive class discussion environment stimulates idea generation, enhances communication skills, improves analytical processes, fosters collaborative networks, tests assumptions, and in general makes learning a fun experience! We value and reward contributions to in-class case analyses and discussions. In this class, this means:

- Being prepared for class discussion – **carefully read the case and complete the assignment before the class**;
- Analyzing cases in a critical and constructive manner, using logic and integrating knowledge of basic marketing concepts;
- **Listening and reacting to comments made by other students**;
- Active participation in completing class exercises, which will include quantitative problems.
The participation marks will map to an assessment of the quality of your contributions in class by the T.A./Professor. **Participation marks will be posted on AVENUE after each week.** At the end of the semester, an overall class contribution score will be given and posted according to the sum of your participation marks during the semester. The class average score of class contribution is about 75% (15 out of 20).

The followings are detail requirements related to class participation:

- Please display your **name cards** regularly in class. I may “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.

- I expect you to be **punctual**. Keep in mind that walking in late and walking out during an ongoing class can be disruptive.

- When you are present in class, **all cell phones 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, or **using computer is FORBIDDEN**. 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".

- 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 provide documentation within one week of returning to school to the Academic Programs Office. However, few marks are awarded for attendance.

- **If you have any concern on your weekly participation marks, please contact the TA in the following two weeks. The marks will not be changed by any reason after two weeks. You are also welcomed to discuss with me if you are concerned on your overall participation scores. I would like to provide detail suggestions for you to more effectively participate in class.**

**Assignment (5%)**

There are two types of assignments: pre-discussion assignment and post-discussion assignment. **Pre-discussion assignments (3%)** are questions to help you prepare for the case discussion. You are required to answer those questions before the class. TA will randomly check your answers at the beginning of each class. **Those who are found not finish the assignment, or finish it poorly will lose points.**

**Post-discussion assignments (2% + bonus):** As time limited, we cannot conduct all analyses in the class. I will then leave some analyses as assignments after class. Good answers may receive bonus credits.

**Group Work**

75% of your final grade is from group projects, including a hand-in case report (15%) and a marketing plan project (60%). Groups will consist of five students (exceptions will be made by the professor given the class size).
Notice of Intent / Group Sign-up Form

- Please complete the last page of this outline and hand in it with your client's letter of cooperation to Dr. Wu at the class on Sept. 19th.

Peer Evaluations

To encourage equal contribution, peer evaluation will be used to assess each member's work. It is recommended to set group ground rules and expectations early in the semester. Groups are also encouraged 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.

- A peer evaluation form will be submitted by 3:30 pm on Wednesday Dec 4th with the completed Marketing Plan.

The evaluation 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 highly 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, and (b) there is lack of proper communication among group members. 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.).

Hand-in Case (15%)

Case: Fortron International.

Due: Electronic copies (in WORD, not PDF format) to the TA by Oct. 8th (Wednesday) midnight

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

Your case report 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.

**Marketing Plan (60%)**

Each group of students will work with a “client” who needs a marketing plan completed. You are expected to conduct a comprehensive analysis on the client’s business, identify its major business problems and provide solutions to the problems. Please note that you are not to (and should not be expected by the client to) solely develop a promotion campaign. You are 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 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% + 10%):**

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. The two presentations will be made using the overhead projector or video /data projector available in class. Unless otherwise decided by the Professor, each presentation will be timed and will not exceed.

**Important:** Unless the professor instructs you otherwise, relevant details of the presentations are given in a later Appendix titled: GROUP PRESENTATION DETAILS.

**First (Interim) Presentation (10%):** The week of Oct. 20th to 24th (The order of presentations is to be decided). Each group has 10 minutes for the interim presentation (additional 5 minutes will be kept aside after each presentation for Q & A / discussion or critique).

During the first presentation, the group will present background information about the client and its current marketing practices, along with an analysis on the client's market including consumer decision process and market segmentation and targeting. The group should also identify the client's major business problem and the goal of the marketing project.

**Final Presentation (10%):** Nov. 24th to Dec. 3rd (The order of presentations is to be decided). Each group has 20 minutes for the final presentation (additional 5 minutes will be kept aside after each presentation for Q & A / discussion or critique).

The second presentation will consist of a brief summary of the former presentation, a strategic domain analysis and a detailed marketing plan to the entire class (and perhaps the client).

**Interim Report (10%):**

Due: Electronic Copies (in **WORD but not PDF format**) to the TA by **Oct. 24th (Friday) midnight**.

**Important:** Unless the professor instructs you, relevant details of the interim report are given in a later Appendix titled: INTERIM REPORT DETAILS.
Final Report (30%):
Due: Dec. 4th (Wednesday) by 3:30 pm to DSB-203 (TWO HARD COPIES)

Important: Unless the professor instructs you, the format/structure of the final report 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 plans contain no grammatical errors, no spelling errors and no uncorrected typographical errors. You must submit two spiral bound copies. We will keep one and mail the second copy to the business.

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 readers 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 expository, 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 to persuade.

Note:
- Avoid emotional, subjective, or vague words.
- Detail is extremely important.
- Report trends and forecasts.
- Link up 4P’s to analysis and solutions to problems.

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 to form a ranking from the best to the least best.

**ACADEMIC DISHONESTY**

You are expected to exhibit honesty and use ethical behaviour in all aspects of the learning process. Academic credentials you earn are rooted in principles of honesty and academic integrity.

Academic dishonesty is to knowingly act or fail to act in a way that results or could result in unearned academic credit or advantage. This behaviour can result in serious consequences, e.g. the grade of zero on an assignment, loss of credit with a notation on the transcript (notation reads: “Grade of F assigned for academic dishonesty”), and/or suspension or expulsion from the university.

It is your responsibility to understand what constitutes academic dishonesty. For information on the various types of academic dishonesty please refer to the Academic Integrity Policy, located at [www.mcmaster.ca/academicintegrity](http://www.mcmaster.ca/academicintegrity).

The following illustrates only three forms of academic dishonesty:

1. **Plagiarism**, e.g. the submission of work that is not one’s own or for which other credit has been obtained.
2. Improper collaboration in group work.
3. Copying or using unauthorized aids in tests and examinations.

**REQUESTING RELIEF FOR MISSED ACADEMIC WORK**

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

a) for missed coursework worth less than 30% of the final grade (and/or absences lasting less than 5 days); or

b) for missed coursework worth 30% or more of the final grade (and/or absences lasting more than five (5) days)

**a) For missed coursework worth less than 30% of the final grade (and/or absences lasting less than 5 days)**

Students must use the MSAF (McMaster Student Absence Form) for their first incidence of missed coursework worth less than 30% for each term. 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 the APO to discuss their situation and will be required to provide appropriate supporting documentation.

b) For missed coursework worth 30% or more of the final grade (and/or absences lasting more than five (5) days

Students MUST report to the APO to discuss their situation and will be required to provide appropriate supporting documentation. If approved, students will be given access to the MSAF system where they will be required to enter the details of the missed coursework for which they were approved. 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.

Students who wish to submit more than one request for relief of missed academic work per term cannot use the online MSAF tool without permission. 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.

The MSAF cannot be used during any final examination period.

Regarding Midterm Conflicts
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.degroeotel.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 mid-term along with acceptable documentation. Instructors cannot themselves allow students to unofficially write make-up exams/tests. Adjudication of the request must be handled by the Academic Programs Office.

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 |

Students who require academic accommodation must contact Student Accessibility Services (SAS) to make arrangements with a Program Coordinator. Academic accommodations must be arranged for each term of study. Student Accessibility Services can be contacted by phone 905-
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 weekly 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:

http://www.pre.ethics.gc.ca

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/

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.
**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>Submit to</th>
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<tbody>
<tr>
<td>Group Signup Form</td>
<td>Sept. 19th</td>
<td>At class</td>
<td>Hard copy to Dr. Wu.</td>
</tr>
<tr>
<td>Hand-in Case</td>
<td>Oct. 8th</td>
<td>Midnight</td>
<td>Electronic copy to the TA</td>
</tr>
<tr>
<td>Interim Report</td>
<td>Oct. 24th</td>
<td>Midnight</td>
<td>Electronic copy to the TA</td>
</tr>
<tr>
<td>Final Marketing Plan</td>
<td>Dec. 4th</td>
<td>3:30 pm</td>
<td>Two hard copies to DSB 203</td>
</tr>
<tr>
<td>Final Peer Evals</td>
<td>Dec. 4th</td>
<td>3:30 pm</td>
<td>Hard copy to Dr. Wu in DSB 214</td>
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<td>(optional)</td>
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# Course Schedule – C07

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<tr>
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<th>Friday</th>
<th>Two-hour session</th>
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<td>Course introduction,</td>
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<tr>
<td>Sept. 8&lt;sup&gt;th&lt;/sup&gt; – 12&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Basic marketing concepts, How to prepare the case, Review previous reports.</td>
<td></td>
<td>To form student groups, Group Game</td>
<td></td>
</tr>
<tr>
<td>Sept. 15&lt;sup&gt;th&lt;/sup&gt; – 19&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Individual group meeting: working schedule.</td>
<td></td>
<td>Case: East Hamilton Miniature Golf – <em>Overview of Marketing Management</em></td>
<td></td>
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</tbody>
</table>

**Group Signup Form (with the Client’s Signature) is due on Friday, Sept. 19<sup>th</sup>**.

| Sept. 22<sup>nd</sup> – 26<sup>th</sup> | Group work / Meeting with Dr. Wu | | Case: Limelight Cinema – *Overview & Rebranding* |
| Sept. 29<sup>th</sup> – Oct. 3<sup>rd</sup> | Group work / Meeting with Dr. Wu | | Case: Greener Pastures – *Target Market* |
| Oct. 6<sup>th</sup> – 10<sup>th</sup> | Group work / Meeting with Dr. Wu | | Case: Mountain Man Brewing – *Product Strategy* |

**Hand-in Case Report is due by Wednesday, Oct. 8<sup>th</sup>**.

| Oct. 13<sup>th</sup> – 17<sup>th</sup> | Group work / Meeting with Dr. Wu | | Case: Reliance Baking Soda: Optimizing Promotional Spending – *Promotion Strategy* |
| Oct. 20<sup>th</sup> – 24<sup>th</sup> | **Interim Presentations** | **Interim Presentations** | |

**Interim Report is due by Friday, Oct. 24<sup>th</sup>**.

| Oct. 27<sup>th</sup> – 31<sup>st</sup> | Group work / Meeting with Dr. Wu | | *Mid-Term Recess* |
| Nov. 3<sup>rd</sup> – 7<sup>th</sup> | Group work / Meeting with Dr. Wu | | Case: Virgin Mobile USA: Pricing for the Very First Time – *Pricing Strategy* |
| Nov. 10<sup>th</sup> – 14<sup>th</sup> | Group work / Meeting with Dr. Wu | | Case: Reed Supermarkets – *Competitive Strategy* |
| Nov. 17<sup>th</sup> – 21<sup>st</sup> | Group work / Meeting with Dr. Wu | | Case: Beauregard Textile Company – *Game Theory* |
| Nov. 24<sup>th</sup> – 28<sup>th</sup> | **Final Presentations** | **Final Presentations** | |
| Dec. 3<sup>rd</sup> | **Final Presentations** | | |

**Final Report is due by 3:30 pm on Wednesday, Dec. 4<sup>th</sup>.**

**IMPORTANT NOTE:** Use the group work sessions to work on either the hand-in cases or on the final project. 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.
APPENDIX

A. GROUP WORK FOR FIRST TWO WEEKS

1st week: Group Work
- Meet with potential group members;
- Discuss individual strengths and weaknesses;
- Exchange contact information;
- Create a list of 2~3 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 group turns in a list of potential group members and the 2~3 project opportunities discussed, to the T.A. This is not yet official but serves as a record of your deliberations. The group signup form due later is the official one.

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.

2nd week: 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
- Fill the group signup form.
B. FORMAT OF HAND-IN CASE WRITE-UP

Your case should be no more than ten pages (font size 11, 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:

<table>
<thead>
<tr>
<th>Section</th>
<th>Contents</th>
<th>Weight (*)</th>
</tr>
</thead>
<tbody>
<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>
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<tr>
<td>Introduction, Problem/Issue Identification, Summary of solution</td>
<td>• Answer the question “This case is about....” in one short, concise paragraph.</td>
<td>About 4%</td>
</tr>
<tr>
<td></td>
<td>• 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</td>
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<td></td>
<td>• Offer a summary of your strategy with a statement “We suggest that to address the (problem/issue), the firm should ...”</td>
<td></td>
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<tr>
<td>Marketing Audit (proposed 4P’s)</td>
<td>• An audit incorporates the identification of current marketing practices i.e. details of 4P’s.</td>
<td>About 15%</td>
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<td></td>
<td>• Offer a summary of the most relevant aspects of the audit in this section, using appropriate sub-headings.</td>
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<tr>
<td></td>
<td>• 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.</td>
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<td></td>
<td>• For details that may be only marginally relevant, use the appendix.</td>
<td></td>
</tr>
<tr>
<td>Consumer Decision Process; Market Segmentation, Targeting, Positioning; Relevant Quantitative Analysis</td>
<td>• Explain the consumers' preferences when they make purchase decisions.</td>
<td>About 20%</td>
</tr>
<tr>
<td></td>
<td>• Discuss the market segmentation.</td>
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<td></td>
<td>• Address the firm’s current target market and current positioning strategy. Some of the strategies may not be evident but can be inferred</td>
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<tr>
<td></td>
<td>• Quantitatively estimate the size of target market segments as precisely as you can. If you need make any assumption to facilitate the estimation, please clearly specify the assumption you make.</td>
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<td></td>
<td>• Conduct any quantitative analysis (break evens, profitability etc) that you think is relevant to later discussion.</td>
<td></td>
</tr>
<tr>
<td>Section</td>
<td>Contents</td>
<td>Weight (*)</td>
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<td>----------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
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</table>
| Strategic Domain Analysis (SWOT - Internal and External Analysis) | • Critical analysis of the key components of the firm’s strategic domain  
• Use subheadings for each of Strengths, Weaknesses, Opportunities and Threats.  
• If there are too many points to be addressed, list all SWOT points with a table in the appendices, and discuss the key points in the main body of the report.  
• A detailed analyses should be followed by the identification of the key Strengths, Weakness, Opportunity and Threats (SWOT)  
• All information should be taken only from the case (do not undertake any external research), and discussed using the “So what?” argument – giving the implication on the problem / challenge  
• Note: If you find yourself writing, “The company has the opportunity to …,” most likely you have identified an alternative not an opportunity. A controllable issue is not part of the external environment. | About 20%          |
| Marketing Strategy (two alternatives)        | • Clear, detailed marketing mix for each alternative – 4P’s and the target market  
• 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. | About 20%          |
| Implementation Plan                          | • Timeline of key activities to implement marketing strategy  
• Each activity contains people, action, money, time, other considerations  
• Separate into what needs to be done right away, and what can wait | About 10%           |
| 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)  
• Typed using a font size of twelve, double-spaced and with one-inch margins all around.  
• Good grammar and spelling | About 4%            |
| Integrity of analyses                        | • All parts of the report should be related to and support each other. That is, the marketing strategy and implementation plan are to solve the identified marketing problem, based on market audit, market segmentation and SWOT analysis. | About 5%            |

(*) 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. 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.
C. GROUP PRESENTATION DETAILS

First (Interim) Presentation (10%)

10 minutes (additional five minutes will be kept aside for Q & A / discussion or critique)

1. Intro to Company
2. The industry size or any significant number trends (You may collection information from NAICS / SIC code)
3. Current Marketing Situation: 4P’s
4. Current Target Market (segmentation, potential size, etc.)
5. Customer Preferences in their decision process. Discuss decision-making unit, sources of customer values, key decision criteria, and briefly how these factors affect the client’s business.
6. Business Problem/Challenge: Quantify. Discuss root cause in the marketing practices
7. Goals / Objectives – Quantitative; establish basis

Final Presentation (10%):

20 minutes (additional five minutes will be kept aside for Q & A / discussion or critique)

1. Brief overview of the first presentation
2. Explain the revised Business Problem/Objectives and bases of revision if you make changes
3. Analysis of strategic domain. Focus on the significant elements pertaining to the business problem and your suggested plan.
   a. Company – strength and weakness;
   b. Consumer – market segmentation, target consumers, and match and mismatch between consumer preferences and the company’s services;
   c. Competitive Environment – primary / secondary competitors;
   d. Collaborators, if relevant – relationships, contracts;
4. Elaborate on your Marketing Strategy alternatives, recommendations and rationale.
5. Implementation plan of the recommended marketing strategy.

Important notes on presentations

- 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.
- It helps to practice beforehand and discuss as a group what needs to be improved upon. Video recording the practice session and debriefing subsequently often help to identify areas of improvement.
- Keep in mind the presentation room infrastructure while you prepare.
- Group effort is essential. 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 ONE WEEK 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.

**D. INTERIM REPORT DETAILS**

**Interim Report (10%):**
Case format guidelines apply.

1. General company introduction includes business type and scale, history, organizational structure, details of education or training and business / other experience of owners / managers, employee numbers, etc.
2. Comment on size of industry and significant number trends (you may collection information from NAICS / SIC code)
3. Discuss Current Marketing Situation:
   a) Product - include lines, service elements, total SKU’s – best / worst sellers, sizes, packaging, store layout, etc.
   b) Price - comment on pricing strategy, trends. You may address the relevant costs, and contribution margins in business operation in this part.
   c) Promotion - include detailed spending on each element – mass media, flyers, direct sales, direct mail etc.
   d) Place – distribution channels, address, map, surroundings, hours of operation,
4. Consumer & Market Analysis
   a) Market segmentation and targeting: How to segment/group customers? Market sizes of each segment? Which market segment does the company currently focus on? Which market segment should/will the company focus on?
   b) Summarize the critical factors in the customers’ consumption decision-making process. What do customer care about, prefer, and appreciate? (Then think about what customer needs have been served by the company, what needs have not been satisfied.)
   c) Positioning: What image does/should the company build to its target market? How does it do so, in term of products, pricing, branding (colours, logo, statements) etc.?
5. Business Problem (Quantify – discuss root cause); Objectives (Quantitative and Qualitative).
6. Attach samples of advertisements, brochures, packaging etc in appendix

**Format guidelines:**
Please conform to the following:
- The report 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.
- Papers should be double-spaced and printed on one side of the paper only. The Executive Summary may be single-spaced.
- The body of the report should not exceed 15 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.
E. MARKETING PLAN STRUCTURE

Final Report (30%):
The marketing plan has the following 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 Name
3. Course and section number,
4. Instructor's name,
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. One sentence introduction of the company
3. A short summary of the major points arising from your analysis.
4. 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. Readers 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. Readers may find that the information contained in the summary section of the marketing plan is sufficient, or if they decide to read the complete marketing plan, find that the summary is preparation for the analysis that follows. The Executive Summary may be single-spaced in a separate page. The summary should not be longer than one page.

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

MARKETING AUDIT
Offers full detail on the 4P’s, current target market, consumer preferences, and current positioning. 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.

PROBLEM IDENTIFICATION
A formal problem statement is useful in furnishing your readers 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 readers the rate of decline, and 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.

**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.

You are suggested (*not strictly required*) to use 4C+1 framework for your strategic domain analysis. Analyze and illustrate potential strengths, weaknesses, opportunities and threats under each of the 4C+1 headings. 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.

4C+1 Framework:
- **Company**
  - ✓ Consider product lines, image in the market, technology and experience, organization structure, culture, goals, etc.
- **Collaborators**
  - ✓ Consider distributors, suppliers, and alliances.
- **Customers**
  - ✓ 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).
  - ✓ Map the consumption decision making process, the consumption decision-making unit and value to your assessment of the SWOT.
- **Competitors**
  - ✓ Consider both actual and potential, direct and indirect competitors with respect to products/services, positioning, market shares, etc.
  - ✓ List the strengths and weaknesses of two major competitors.
- **Context**
  - ✓ Consider political & regulatory environment, economic environment, social/cultural environment, and technological environment

This section should be the bulk of your report. **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 indentifying trends and developing forecasts.** Graph your information – use pictures and save on words.

**OBJECTIVES**
This part of the marketing plan will include a list of specific and measurable business objectives (quantitative and/or qualitative) - and criteria by which to evaluate your alternative solutions. It is important to provide clear rationale for your goals.

**STRATEGY ALTERNATIVES & 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 all
changes in the marketing mix commenting on 4P’s, the target segment(s), positioning, outcomes 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. Thus, your decision
should be based on previous strategic domain analysis.

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.

In some cases, your client company, running a stable and satisfying business, does not have a significant
problem to be solved, but needs improvements from several aspects. Then you may want to consider more
than two strategies/tactics addressing improvement in the different aspects, discuss the pros and cons of
each strategy/tactic, and summarize into a portfolio of recommended tactics.

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/probable/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:

1. 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.
2. Papers should be double-spaced and printed on one side of the paper only. The Executive
Summary may be single-spaced.
3. The body of the report is not to exceed 40 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.
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. In our example, the fee could be as low as $0 or as high as $3,000.

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 $600 * GROUP SIZE.

PROFESSOR: Dr. Ruhai Wu

GROUP NAME: ____________________________

CLIENT ORGANIZATION: ____________________________________________________________

GROUP MEMBER          SIGNATURE             FEE

____________________  ____________________  ____________

____________________  ____________________  ____________

____________________  ____________________  ____________

____________________  ____________________  ____________

____________________  ____________________  ____________

____________________  ____________________  ____________
A SAMPLE OF LETTER OF COOPERATION

Letter of Cooperation

[Firm Name]
[Firm Address]

[Date]

To whom it may concern:

This letter is to confirm my willing participation in the process of developing a marketing plan for my business, [Firm Name]. The marketing plan will be conducted by a group of students enrolled in Commerce 3MC3 at DeGroote School of Business ([Student names]).

I am aware that any information I, and my employees, share will be strictly used for case analysis in class and other related academic purposes.

If any further information is required, I can be reached at [contact information].

Yours Sincerely,

[Signature]

Owner Name
NOTICE OF INTENT / GROUP SIGN-UP FORM

Professor: Dr. Ruhai Wu

GROUP Name: ____________________________________________

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<th>STUDENT NAME</th>
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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.

__________________________________________________________________