Commerce 3MC3
APPLIED MARKETING MANAGEMENT
Winter 2016 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 analyze the business environment in which organizations operate. A major field project, which has student teams working with companies, is a critical part of this course.

**INSTRUCTOR AND CONTACT INFORMATION**

Sec C01:  Tuesday 2:30 - 4:20pm (DSB B107) / Thursday 2:30 - 3:20pm (DSB B107)

**Dr. William Allender**
Assistant Professor
allendw@mcmaster.ca
Office: DSB #222
Office Hours: By Appointment
Tel: (905) 525-9140 ext. 24756

**Teaching Assistant**
Sean Everingham
everinsp@mcmaster.ca

**COURSE ELEMENTS**

<table>
<thead>
<tr>
<th>Credit Value:</th>
<th>3</th>
<th>Leadership:</th>
<th>No</th>
<th>IT skills:</th>
<th>No</th>
<th>Global view:</th>
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<tbody>
<tr>
<td>Avenue:</td>
<td>Yes</td>
<td>Ethics:</td>
<td>Yes</td>
<td>Numeracy:</td>
<td>Yes</td>
<td>Written skills:</td>
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<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 practice 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.
LEARING 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 (Allender)  
- Please purchase a copy at the bookstore.  
  ~$ 55 CAD

Avenue registration for course content, readings and case materials  
  • http://avenue.mcmaster.ca

EVALUATION

Components and Weights

<table>
<thead>
<tr>
<th>Component</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Class Contribution</td>
<td>20%</td>
</tr>
<tr>
<td>B. Assignments</td>
<td>5%</td>
</tr>
<tr>
<td>C. Hand-In Case Completed by the Group</td>
<td>15%</td>
</tr>
<tr>
<td>D. Industry Project</td>
<td>60%</td>
</tr>
</tbody>
</table>
  • 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>
</tr>
</thead>
<tbody>
<tr>
<td>A+</td>
<td>90 - 100</td>
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<tr>
<td>A</td>
<td>85 - 89</td>
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<td>A-</td>
<td>80 - 84</td>
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<td>B+</td>
<td>77 - 79</td>
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<td>B</td>
<td>73 - 76</td>
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<td>B-</td>
<td>70 - 72</td>
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<td>C+</td>
<td>67 - 69</td>
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<td>C</td>
<td>63 - 66</td>
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<td>C-</td>
<td>60 - 62</td>
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<tr>
<td>D+</td>
<td>57 - 59</td>
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<tr>
<td>D</td>
<td>53 - 56</td>
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<tr>
<td>D-</td>
<td>50 - 52</td>
</tr>
<tr>
<td>F</td>
<td>00 – 49</td>
</tr>
</tbody>
</table>
Communication and Feedback

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 and the receipt is then brought to Student Experience - Academic Office (formerly the APO) in DSB 104
- 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

Class Participation and Contribution (20%)

It is our belief that highly interactive environments are the breeding grounds for excellence in stimulating idea generation, enhancing communication skills, improving analytical processes, fostering collaborative networks, testing assumptions, and having fun! 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 contribution. For our marketing class, contribution relates to:

- Being prepared for the 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.

Participation marks will be posted on Avenue on a weekly basis. If you have any concerns about your weekly participation mark, please contact the TA within two weeks. The marks will not be changed for any reason after two weeks have passed. You are also welcome to discuss any
overall participation mark concerns you have with the Professor, who is happy to provide suggestions and guidance about earning participation marks. 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. Historically, the class average contribution score is about 75%.

The key to a high class participation grade is making quality contributions to every class discussion. Marks will be awarded on both quality and consistency. However, there are no marks just for attendance. Additional expectations related to class participation are:

- 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. Walking in late and walking out during an ongoing class is disruptive and distracting, so please try to avoid it when possible.
- 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.

**Group Work**

You will form groups of five people (or six with instructor permission). Each group has two case assignments to complete – due approximately four weeks apart. The group is also responsible for completing a Marketing Plan for a client and making in-class presentations of the plan. **All group members should be attending the same class section.** Please complete the last page of the course outline and submit it NO LATER THAN Thursday, January 21st to Dropbox on Avenue, or to the TA in class.

75% of your mark in this course is teamwork 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 peer evaluation form (attached to this outline) should be submitted no later than Friday, April 8th, with the completed Marketing Plan. **If I do not receive a peer evaluation form from you, I will assume that you feel each member of the group contributed equally.**

Past experience with groups has shown that problems typically arise because individuals do not respect the group process. The first group meeting should happen next week. At this meeting choose a group leader who will help facilitate the work. This is a good time to set the parameters for group work such as: when the group will meet, attendance at group meetings including punctuality, and preliminary assignment of tasks. You should also 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.
**Hand-in Case (15%)**

Case: Tremco (it is not in the courseware, but will be provided by the Professor).

Due: Please upload an electronic copy to Avenue by the start of class on February 11th (Thursday).

**Important:** The format/structure of the hand-in case is detailed in Appendix B: FORMAT OF HAND-IN CASE WRITE-UP

Your case report should be no more than ten pages excluding 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, or 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 of the client’s business, identify its major business problems and provide solutions to them. Please note that you are not (and should not be expected by the client) to solely develop a promotion campaign (i.e. the marketing plan is more than just a promotion campaign). Students are strongly encouraged to develop and cultivate their own relationships with the businesses and find one to work with. However, the Marketing area identifies a number of potential businesses to work with as well. In either case, each group needs the Professor’s approval for a proposed project.

There are four group assignments related to the marketing plan: two presentations, one interim report, and the final written marketing plan.

**Group Presentations (10% + 10%):**

All group members must participate in the presentations. The presentations and resulting discussion period are an opportunity for your group 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. Each group is expected to practice the presentation prior to its debut in class and should not exceed the allocated class time limit (refer to the instructions in the Appendix).

**First (Interim) Presentation (10%):** The week of Feb. 23 to 25. (Presentation slides should be uploaded to Avenue by the start of class). Each group will have approximately 10 minutes for the interim presentation and 5 minutes thereafter for Q & A from the Professor and class.

During the first presentation, the group will present background information about the client and its current marketing practices, along with an analysis of 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%):** Mar 29th to Apr 7th (Presentation slides should be uploaded to Avenue by the start of class). Each group will have about 20 minutes for the final presentation and 5 minutes thereafter for Q & A from the Professor and the class. The final presentation will consist of a brief summary of the former presentation, a strategic domain analysis, and the details of the marketing plan.

**Important:** Additional presentation information is provided in an Appendix at the end titled: GROUP PRESENTATION DETAILS.

**Interim Report (10%):**
Upload an electronic copy of the interim report to Dropbox on Avenue (in Word or PDF format only) by midnight on March 3rd (Thursday).

**Important:** Additional interim report details are given in an Appendix at the end titled: INTERIM REPORT DETAILS.

**Final Report (30%):**
Upload an electronic copy of the final Marketing Plan to Dropbox on Avenue (in Word or PDF format only) and submit 1 HARD COPY to DSB-203 on April 8th (Friday) by 3:30 pm.

**Important:** Final report format/structure details are provided in an Appendix at the end titled: MARKETING PLAN STRUCTURE.

A Marketing Plan is essential for every business operation and for efficient and effective marketing of any product or service. The Marketing Plan will allow you to clearly visualize both where a company is going and what the company wants to accomplish along the way. At the same time a Marketing Plan details the very important steps required to get the company from where it is to where it wants to be. An added benefit is that in compiling and developing the Marketing Plan, a company will have thought through how long it will take to accomplish each step and what resources in money, time, and effort will be needed in order to do so.

A Marketing Plan forces management to separate achievable objectives from “pie-in-the-sky” conjecture. **Detail is important here.** Typically, businesses create Marketing Plans in which some sections are very detailed (i.e., a manager has given the material a lot of thought) while other, equally important, sections have little detail. You must not fall into this trap. The audience for a Marketing Plan is senior management. These people thrive on details – Who specifically is the competition? What specifically are the products? How specifically will the budget be used?

A well-prepared Marketing Plan:
- Acts as a road map – describes the environment (i.e., competitors, regulations, economic conditions, demand, social and cultural factors, and demographics);
- Assists in management control and implementation of strategy – compare what is happening to what was planned to happen;
- Informs new participants of their roles in implementing the plan and reaching the objectives – gives all participants the “big picture” so they see how they contribute;
• Assists in obtaining resources for implementation – allows management to decide if money, people, and other assets will be assigned to this project;
• Stimulates thinking and better use of limited resources – builds on strengths and minimizes weaknesses to achieve synergies;
• Helps organize and assign responsibilities, tasks, and timing; and
• Makes one aware of problems, opportunities, and threats in the future.
• Avoids emotional, subjective, or vague words (e.g. buzzwords).
• Is detail oriented. Be direct, specific, and do not digress.

Students must submit a marketing plan that is well organised, well written, accurate, and complete in its analysis. Clarity and conciseness are important. High quality Marketing Plans contain no grammatical or spelling errors, and no uncorrected typographical mistakes. You must submit an electronic and a hard copy (spiral bound) of the report. The electronic copy will be graded and the hard copy will be mailed to the client.

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 focus 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 audience. 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.

**A NOTE ON GRADING**

The evaluation to determine a grade is based on the quality of the submission. As with most evaluations in the social sciences there is a bit of subjectivity. 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 earns 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 as well as 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.

Documents submitted to Avenue will be checked using Originality Checker. This is a new feature of Avenue and is a plagiarism detection tool that is directly linked to Turnitin among others. For more information about how Originality Checker works please visit https://avenue.cllmcmaster.ca/d2l/lp/inlineHelp/75806/help?titleTerm=Framework.PopupHelp.le_howTI1work&descriptionTerm=Framework.PopupHelpDesc.le_howTI1work

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 absences from classes lasting up to three (3) days; or
b) for absences from classes lasting more than three (3) days, or

c) for conflicts arising from Student Experience - Academic Office approved events

a) For absences from classes lasting up to three (3) 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 less than 25% of the course weight. 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. Details are described below.

If the value of the component is worth 25% or more, students must report to their Faculty Office (the Student Experience – Academic Office for Commerce students) to discuss their situation and will be required to provide appropriate supporting documentation.

Please visit the following page for more information about MSAF:
http://academiccalendars.romcmaster.ca/content.php?catoid=13&navoid=2208#Requests_for_Relief_for_Missed_Academic_Term_Work

b) For absences from classes lasting more than three (3) days

Students cannot use the MSAF. They MUST report to their Faculty Office (the Student Experience – Academic Office 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 Student Experience – Academic Office 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 Student Experience – Academic 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 Student Experience – Academic Office of their interest in an alternate sitting of the midterm.

Adjudication of all requests must be handled by the Student Experience – Academic Office. Instructors cannot allow students to unofficially write make-up exams/tests.

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.
**POLICY FOR APPROVED MISSED ACADEMIC WORK**

Students who cannot write a test, and have advanced knowledge and permission as described above, will be given the opportunity to write an alternate version of the test and an alternate time.

Students who did not write a test, and subsequently provide an MSAF submission, or documentation for which they have been approved by the Student Experience – Academic Office, will have the weight of the missed work reallocated across other course components. The student must follow up with the instructor to understand this process and decision.

Students who submit an MSAF, or have been approved by the Student Experience – Academic Office, for an assignment deadline, should contact the Professor immediately (within 3 days) to work out an alternative.

**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 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 905-525-9140 ext. 28652 or e-mail sas@mcmaster.ca

For further information, consult McMaster University’s Policy for Academic Accommodation of Students with Disabilities;


**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>
</tr>
</thead>
<tbody>
<tr>
<td>Group Signup Form</td>
<td>Jan. 21st</td>
<td>At class</td>
<td>Hard copy to the TA</td>
</tr>
<tr>
<td>Hand-in Case</td>
<td>Feb. 11th</td>
<td>At class</td>
<td>Electronic copy to Avenue to Learn</td>
</tr>
<tr>
<td>Interim Report</td>
<td>Mar. 3rd</td>
<td>Midnight</td>
<td>Electronic copy to Avenue to Learn</td>
</tr>
<tr>
<td>Final Marketing Plan</td>
<td>Apr. 8th</td>
<td>3:30 pm</td>
<td>1 electronic copy uploaded to Avenue, &amp; 1 hard copy to DSB 203</td>
</tr>
<tr>
<td>Final Peer Evals (optional)</td>
<td>Apr. 8th</td>
<td>3:30 pm</td>
<td>Hard copy to Dr. Allender in DSB 222</td>
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# Course Schedule – C01

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<tr>
<th>Week</th>
<th>Tuesday Two-hour session</th>
<th>Thursday One-hour session</th>
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<tbody>
<tr>
<td>Jan. 5(^{th}) – 7(^{th})</td>
<td>Course Introduction; Basic Marketing Concepts.</td>
<td>How to prepare the case</td>
</tr>
<tr>
<td>Jan. 12(^{th}) – 14(^{th})</td>
<td>To form student groups, Group Game</td>
<td>Individual group meeting: working schedule.</td>
</tr>
<tr>
<td>Jan. 19(^{th}) – 21(^{st})</td>
<td>Case: Greener Pastures – <em>Marketing Overview</em></td>
<td>Case: Limelight Cinema – <em>Overview &amp; Rebranding</em></td>
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</tbody>
</table>

**Group Signup Form (with the Client’s Signature) is due on Thursday, Jan. 21\(^{st}\).**

| Jan. 26\(^{th}\) – 28\(^{th}\) | Case: East Hamilton Miniature Golf – *Marketing Strategy* | Group work / Meeting with Dr. Allender |
| Feb. 2\(^{nd}\) – 4\(^{th}\) | Case: Mountain Man Brewing – *Product Strategy* | Group work / Meeting with Dr. Allender |
| Feb. 9\(^{th}\) – 11\(^{th}\) | Case: Reliance Baking Soda: Optimizing Promotional Spending – *Promotion Strategy* | Group work / Meeting with Dr. Allender |

**Hand-in Case Report is due by start of class on Thursday, Feb. 11\(^{th}\).**

| Feb. 16\(^{th}\) – 18\(^{th}\) | *Mid-Term Recess* | *Mid-Term Recess* |
| Feb. 23\(^{rd}\) – 25\(^{th}\) | Interim Presentations | Interim Presentations |
| Mar. 1\(^{st}\) – 3\(^{rd}\) | Case: Virgin Mobile USA: Pricing for the Very First Time – *Pricing Strategy* | Group work / Meeting with Dr. Allender |

**Interim Report is due by Thursday, Mar. 3\(^{rd}\) midnight.**

| Mar. 8\(^{th}\) – 10\(^{th}\) | Case: Reed Supermarkets – *Competitive Strategy* | Group work / Meeting with Dr. Allender |
| Mar. 15\(^{th}\) – 17\(^{th}\) | Retail Simulation Game. | Group work / Meeting with Dr. Allender |
| Mar. 22\(^{nd}\) – 24\(^{th}\) | Case: Kraft Foods: Coffee Pod Launch – *New Product Launch* | Group work / Meeting with Dr. Allender |

**Final Presentations**

| Mar. 29\(^{th}\) – 31\(^{st}\) | Final Presentations | Final Presentations |
| Apr. 5\(^{th}\) – 7\(^{th}\) | Final Presentations | Final Presentations |

**Final Report is due by 3:30 pm on Friday, Apr. 8\(^{th}\).**

**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 (to the T.A.) a list of potential group members and the 2~3 project opportunities discussed. 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 do a fair amount of work among yourselves to be in a position to form a group by the next week’s deadline. This will 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 your preferred group may be limited. However, it is rare that you’ll have much control of the composition of your coworkers in real life. So, part of the challenge is to work with the randomness that comes with this process. Conflicts are as much a part of working in a group, as are moments of agreements. So, keep an open mind, adapt when necessary, be fair, and clearly articulate your expectations of others as well as what they can expect from you.

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 how to follow up and contact the firm for the project
- Fill in and submit the group signup form.
B. FORMAT OF HAND-IN CASE WRITE-UP

Your case should be **no longer 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 financial analysis, segmentation grids, or decision matrices should be housed. Appendices not referenced in the body of the report will not be marked. **Any other elements of the case analysis do not belong in the Appendices and if included they will not be marked.**

In terms of appearance, your objective is a case that is up to the best business standards. That means that your case should be typed and double-spaced, should have one inch margins all around and should employ a font size of no smaller than twelve points. Whole numbers twenty or less should be written in words. *Good English grammar and spelling count* so edit carefully. Marks will reflect this.

Do not expect to run the spell checker and consider your paper proofread. Spell checkers are not fool proof and there is no substitute for the pride you show in your work by manually proof reading it *before* it is submitted. Do not make the marker proofread for you!

**TIMING**

Written case assignments will be accepted for grading only **by class time or noon** on the assigned due date. Please do not wait until the day the report is due to complete it. Viruses, printer problems, file or disc problems, etc. should all be detected and corrected before the due date. Successful business people plan to avoid such things. We will attempt to return the cases to you in plenty of time to use the feedback for improvement on your next case.

**FORMAT**

Please use the suggested case solution template listed below for your case submissions.

<table>
<thead>
<tr>
<th>Section</th>
<th>Contents</th>
<th>Weight (*)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title Page</td>
<td></td>
<td>About 1%</td>
</tr>
<tr>
<td>Table of Contents</td>
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</tr>
<tr>
<td>Introduction, Problem/Issue Identification, Summary of solution</td>
<td>State the main issues of the case omitting descriptive details. This may take the form of a problem statement but it may be a statement of a marketing opportunity to which the firm may be able to react. Distinguish between the issues as seen by the “actors” in the case and additional issues perceived by you. This section gives the case report focus. All following sections should then be analyzed in terms of what it means to the problem at hand.</td>
<td>About 4%</td>
</tr>
<tr>
<td>Section</td>
<td>Contents</td>
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<tr>
<td>Marketing Audit (proposed 4P’s)</td>
<td>Describe the company’s current target market and marketing mix (Four P’s). The audit is a statement of case facts requiring relatively little interpretation by the group. You may have to make some assumptions to complete gaps when information is not explicit. For instance, the exact pricing strategy may not be explicitly stated but the pricing strategy can be inferred from information presented in the case. This is the current marketing strategy. This is the logical starting point since the primary purpose of your analysis is to produce a superior marketing strategy for the company.</td>
<td>About 15%</td>
</tr>
<tr>
<td>Consumer Decision Process; Market Segmentation, Targeting, Positioning; Relevant Quantitative Analysis</td>
<td>Explain the consumers’ preference(s) when they make purchase decisions. Discuss the market segmentation. This should address the firm’s current target market and current positioning strategy. Some of the strategies may not be evident but can be inferred. Make a numeric estimate of the size of target market segment(s) as precisely as possible. You will likely need to make some assumptions to facilitate the estimate(s), please clearly specify the assumptions. Conduct any quantitative analysis (break even points, profitability, etc.) that is, or may be, relevant to the discussion.</td>
<td>About 20%</td>
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</table>
| Strategic Domain Analysis (SWOT - Internal and External Analysis) | **INTERNAL**  
This is a listing of the company’s key strengths and weaknesses. They are internal to a firm and directly controllable by management. Each strength or weakness should consist of a statement of the company characteristics taken straight from the case and then the implication of the case fact. This answers the question – “So what?” – and gives the characteristic meaning in terms of the firm or the problem.  
Use one sub-heading for “Strengths” and one for “Weaknesses.” You may also find that several characteristics can be grouped. For instance you might want to suggest that a firm is innovative because: 1) it launches one new product per year; 2) it invests in new technology to streamline operations; and 3) invests heavily in research and development. These are not three separate strengths but three aspects of one strength.  
**EXTERNAL**  
Be sure to conclude this subsection with a summary statement telling the reader if you see the company as stronger or weaker. | About 20%  |
<table>
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| **Marketing Strategies** | The correct number of alternatives might be suggested by the case. For instance, should a certain product be launched? Other cases are more open-ended and the group could generate a near infinite list of alternatives. As a rule of thumb consider no less than three alternative courses of action for the company and certainly no more than five.  
Each alternative should consist of a description of the prospective marketing strategy (some combination of new/revised target market and/or Four P’s) and an analysis of its pros and cons. The analysis should focus on the strategy’s ability to repair weaknesses, mitigate threats, build on strengths, or exploit opportunities facing the company. Be clear and concise. You are writing a business report – not an essay. | About 20%   |
| **RECOMMENDED STRATEGY** | State which one of the alternative strategies you recommend. Conceivably, you might recommend a combination of alternatives to cover shorter and longer planning horizons. Justify your choice by saying why you rejected the other alternatives. Do not name a strategy here that was not described and evaluated in the previous section. |             |
| **Implementation Plan**  | This is the action plan (when and what) that puts the recommended strategy into effect. It flows directly from the chosen strategy but should overlap it very little. This is not a restatement of your recommended strategy. It probably will help to create a timeline with defined steps/stages.  
Students are often surprised that some very major activities (i.e., | About 10%   |
<table>
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<td>acquiring a company) belong in this section. Marketing strategies consist solely of decisions about target markets and the Four P’s. An acquisition is a way to obtain a new product once the strategic decision has been made to launch one. An implementation plan considers what has to happen, when it has to happen, who makes it happen, and, where possible, how much should be budgeted to make it happen.</td>
<td></td>
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<tr>
<td>Bibliography</td>
<td>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.)</td>
<td>About 1%</td>
</tr>
<tr>
<td>Case Assignment Format Guidelines</td>
<td>Ten Pages <strong>not</strong> 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</td>
<td>About 4%</td>
</tr>
<tr>
<td>Integrity of analyses</td>
<td>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.</td>
<td>About 5%</td>
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(*) These numbers are meant 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 transitions, 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. Introduction to the Company
2. The industry size or any significant number trends (You may collect 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: Discuss root cause in the marketing practices
7. Goals / Objectives – Quantify and 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 – strengths and weaknesses;
   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 interests as well as make them understand the merits of your approach. Use your time wisely.
- Your group should practice together beforehand and discuss as a group what needs to be improved upon. Video recording the practice session and debriefing subsequently often helps identify areas that need 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 his/her 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 Guidelines (10%):**

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 (and expected benefits of) each element – mass media, flyers, direct sales, direct mail, etc.
   d) Place – distribution channels, address, map, surroundings, hours of operation, etc.
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 customers care about, prefer, and appreciate? (Think about, but do not write down what customer needs have been served by the company and which have been overlooked.)
   c) Positioning: What image does/should the company communicate to its target market? How should/does it do so, in terms 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 an appendix.

**Format guidelines:**

Please conform to the following:

- The report should use double spaced Times New Roman font and have numbered pages. Font size for the body of the report should not be smaller than 11 point. Left / right margins must be no smaller than 1 inch each.
- The body of the report should not exceed 10 pages. Import all industry trend findings and reference graphs/figures in the main body of the report. This page limit does not include the title page, table of contents, bibliography or appropriate appendices.
- The report should be turned in electronically to Avenue in Word or pdf format. DO NOT hand in a printed copy.
E. MARKETING PLAN STRUCTURE

Final Report (30%):
The marketing plan should include the following sections.

TITLE PAGE
The first page is the title page and contains:
1. The name of the contact and organization including mailing and email 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 in 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 understanding the analysis that follows. The Executive Summary may be single-spaced in a separate page, and usually contains multiple paragraphs. The summary should not be longer than one page.

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

MARKETING AUDIT
This section offers full detail of the 4P’s, current target market (Include an estimate / analysis of the size of the market), consumer preferences, and current positioning. Gives insights 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 determine 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. There could be many reasons why market share is declining, and consequently, many possible solutions – most of which will not be effective unless you know why market share is falling. Namely, 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 between 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 encouraged (*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 discuss 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**
  - Map the consumption decision making process, the consumption decision-making unit, and value to your assessment of the SWOT.
  - If it matters, discuss how the business is affected by industry trends. Use secondary research to highlight demand forecasts. For example - online purchases by Canadians are expected to exceed $24 trillion by 2026 (reference).
- **Competitors**
  - Consider actual and potential, as well as direct and indirect competitors with respect to products/services, positioning, market shares, etc.
  - List the strengths and weaknesses of two major competitors.
- **Context**
  - Consider the relevant 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(s) or service(s). Therefore, focus on indentifying trends and developing forecasts. Graph your information – use pictures or figures to do this.

**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 a clear rationale for your goals.
STRAIGHT ALTERNATIVES & RECOMMENDATION
This part of the marketing plan will include a discussion of at least 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 the 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 the 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 you will distinguish the product or service 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 the 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 them 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. Include supporting notes / financial justification for the recommended strategy as well. 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. The Marketing plan should be double spaced, use Times New Roman font, and numbered pages. The font size for the body should not be smaller than 11 point. Left / right margins must be no smaller than 1 inch each.
2. Papers should be printed on one side of the paper only. The Executive Summary may be single-spaced.
3. The body of the report should not exceed 30 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.