

Commerce 3MC3
APPLIED MARKETING MANAGEMENT
Fall 2021 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 C08: Monday 9:30 am - 11:20 am / Friday 8:30 am - 9:20 am
Sec C09: Tuesday 4:30 pm - 5:20 pm / Thursday 2:30 pm - 4:20 pm

Ruhai Wu	Professor	wuruhai@mcmaster.ca
Betty Ji	Teaching Assistant (C08)	jiz3@mcmaster.ca
Syed Mohammad Ali Shah	Teaching Assistant (C09)	shahs77@mcmaster.ca

Office Hours are by appointment

COURSE ELEMENTS

Credit Value:	3	Leadership:	Yes	Ethics:	Yes	Innovation:	Yes
ELM:	Yes	Verbal skills:	Yes	Numeracy:	Yes	Political:	No
Participation:	Yes	Written skills:	Yes	Team Work:	Yes	Social:	Yes

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

- Cases and readings at no cost: **eReserves at Avenue to Learn**
- Harvard/Ivey cases — **Purchase Instruction at Ivey Publishing:**
 1. Go to the Ivey Publishing website
 2. Log in to your existing account or Register for a student account.
 3. Click on this link or copy into your browser: [<https://www.iveypublishing.ca/s/ivey-coursepack/a1R5c00000FA85LEAT/applied-marketing-management-3mc3-c0809>]
 4. Click Add All to Cart.
 5. Go to your Shopping Cart and proceed through the Checkout.
 6. When payment has been processed, an Order Confirmation will be emailed to you.
 7. To download your digital copies, click on View My Order --> Downloads.
 8. Downloads can also be accessed by clicking on your username --> Orders --> Downloads

COURSE EVALUATION

Components and Weights

A.	Class Participation and Contribution	20%
	• Written answers through Zoom chat channel	10%
	• Oral contribution to case discussions	10%
B.	Case Assignments	10%
C.	In-Class Group Assignments	5%
C.	Hand-In Case Completed by the Group	15%
D.	Industry Project	50%
	• Interim Oral Presentation	10%
	• Final Oral Presentation	10%
	• Final Marketing Report for the Industry Project	30%
TOTAL:		100%

Grade Conversion

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

LETTER GRADE	PERCENT	LETTER GRADE	PERCENT
A+	90 - 100	C+	67 - 69
A	85 - 89	C	63 - 66
A-	80 - 84	C-	60 - 62
B+	77 - 79	D+	57 - 59
B	73 - 76	D	53 - 56
B-	70 - 72	D-	50 - 52
		F	00 - 49

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 #9 in the term. Instructors may solicit feedback via an informal course review with students by Week #4 to allow time for modifications in curriculum delivery.

COURSE DELIVERABLES

LEARNING ACTIVITIES	DELIVERY	DESCRIPTION	TOOL(S)
Readings	Asynchronous	Students will read and prepare cases for in-class discussions	Custom Courseware
Live Case Discussions	Synchronous	Live discussion of case studies assigned by the professor — in two-hour sessions	Zoom
Live Group Assignments	Synchronous	Live group discussion to complete the assignments by the professor — in one-hour sessions	Zoom
Group Work	Asynchronous	Work in groups to complete two oral presentations, one written case analysis, and a final marketing plan report.	At each group's discretion

Zoom Account

You are required to use a **Zoom account associated with your McMaster email address.**

INDIVIDUAL WORK (23%)

Class Participation and Contribution (20%)

We learn more by doing than by watching. A highly interactive class discussion environment stimulates idea generation, improves analytical processes, fosters collaborative networks, 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 questions before the class discussion
- Analyzing cases critically and constructively, integrating logic, marketing concepts, calculation, and imagination in your analyses, and sharing your opinions and reasonings
- Learning from and responding to comments made by other students.

Chat window participation: In each case discussion, there will be two to three questions asking your instant comments. Type your opinion and reasoning through private chat to the TA. The TA will grade your answers and post the chat window participation marks on Avenue to Learn after each case discussion (in the two-hour sessions).

You can share your thoughts and questions through public chat to the class when not having a chance to share them orally. These written comments will not be counted in your participation/contribution mark if there is no following class discussion. However, if the professor arranges a class discussion based on your written comment, your contribution will be added to the oral contribution mark.

Oral participation: The T.A./Professor will assess both the **quantity** and the **quality** of your oral comments in class discussions and give oral participation marks. Interim oral contribution marks will be posted after the 4th case discussion. Contact me then if your mark is low, or well before if you are concerned that it will be low. There are ways I can help you to participate more effectively.

There are several protocols and suggestions for participating in a virtual classroom.

Protocols:

- Log in meetings with the Zoom account **associated with your McMaster email address.**
- You are required to **keep your camera on** during the class discussion. You are required to keep your mic muted when listening others' comments. Please remember to unmute your mic when making comments to the class.
- Make sure **your full name is displayed** as your "screen name" in the Zoom meetings. 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.

Suggestions:

- Make sure your video and audio settings work properly. Consider using a pair of headphones or earphones. If you do not want to show the real background, use a cool virtual background.

- Be familiar with Zoom functions, especially "mute/unmute," "raising hand," voting, messaging, sending and receiving files.
- Be prepared to meet Internet connection problems occasionally. When you meet such a problem, inform the TA through an email as soon as possible. If you constantly have connection problems, please talk to the professor.

The protocols and suggestions may be revised by the professor during the semester. You will be given advance notice if such a change is made.

Case Assignments (10%)

A list of questions will be assigned before each case discussion and will be discussed in the class. Answer those questions in a WORD document and submit it to Avenue to Learn by midnight before the class discussion. After the class discussion, refine your answers in the same WORD document and track all revisions, and submit the revised document (with all tracked changes) to Avenue to Learn by midnight after the class discussion. The TA will evaluate both submissions and give you one assignment mark. Pre-discussion answers show how well you prepared the case, and the post-discussion answers show how you learn from the case discussion. More weight will be put on the second submission. Your overall assignment mark is the average of the assignment marks of all cases.

GROUP WORK (70%)

70% of the final grade is from group work, including several in-class group assignments (5%), a hand-in case report (15%), and a marketing plan project (50%). Each group will consist of four to six students (exceptions may be made by the professor given the class size).

Notice of Intent / Group Sign-up Form

Please complete the **Notice of Intent Form** (available on Avenue to Learn) and obtain a **Letter of Cooperation** from your client by the end of the third week. A sample template of the letter of cooperation is provided on Avenue to Learn. Please submit the two documents to Avenue to Learn by midnight on Sunday, Sept. 26th.

In-Class Group Assignments (5%)

There will be several in-class group assignments, mainly held in one-hour sessions. Groups will use Zoom breakout rooms to discuss and complete the assigned tasks. Marks will be given based on the groups' performance.

Hand-in Case (15%)

Case: Tremco Ltd.

Due: An electronic copy of the report in **WORD format** should be submitted to the Avenue to Learn by midnight on Friday, Oct. 8th

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

Marketing Plan (50%)

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 the problems. Please note that you are **not** (and should **not be expected by the client**) to develop a promotion campaign solely.

You are expected to develop your own leads. Do **NOT** work with chain stores or franchises where a head office sets the marketing strategy. Do **NOT** work with a client less than one year old in which the manager does not know the business well. Do **NOT** work with a big company whose business is too complicated for you to analyze. The best clients are small/mid-sized businesses that are independently owned and operated. You need the professor's approval for your proposed project.

The project contains three group assignments: two presentations and the final marketing report.

Group Presentations (10% + 10%):

The presentations and the following discussions are an opportunity for you to receive feedback from the entire class before either continuing with the marketing plan development or submitting the plan. Detailed requirements of the presentations are in the Appendix titled: GROUP PRESENTATION DETAILS.

All group members must participate in the presentations. Each presentation will be timed and should not exceed the time limit. The group presentations will be recorded. The video record will only be reviewed by the professor, the TA, and the presenting group.

Interim Presentation (10%): Oct. 25th to 29th (The order of presentations is to be decided). Each group has 12 minutes for the presentation plus 5 minutes for Q & A / discussion or critique. Please submit your slides on Avenue to Learn before the presentation.

Final presentation (10%): Nov. 29th to Dec. 8th (The order of presentations is to be decided). Each group has 20 minutes for the final presentation plus 5 minutes for Q & A / discussion or critique. Please submit your slides on Avenue to Learn before the presentation.

Due to the time limit, you may not go through all details in the presentations. Hence, list details in the slides but address key points in the presentation. Your presentation marks count both content thoroughness and presentation performance. The grading of content is based on the content on your slides.

Final report (30%):

Due: An electronic copy of the report in the **WORD format** should be submitted by midnight on Wednesday, Dec. 15th

The format/structure of the final report is detailed in the Appendix titled: MARKETING PLAN STRUCTURE.

Students must submit a marketing plan that is well organized, 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 typographical errors.

The marketing plan written in this course is expected to have met the same standard 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 readers that reasonable alternative strategies have been considered. It should convince the 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 organization should be suitable for that purpose and person. Do not write the marketing plan to your professor 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.**
- **Details are important.**
- Report trends and forecasts.
- Link up 4P's to analysis and solutions to problems.

Peer Evaluation

Peer evaluation will be used to assess each group member's work. An optional peer evaluation form is provided on Avenue to Learn. A group needs to submit it only if the distribution is not equal. The evaluation form will be effective **only if** all the group members sign on it or send a confirmation using their McMaster email accounts. (If you fail to do so, I will assign your evaluation marks as per my discretion based on information at my disposal.)

- A peer evaluation form should be submitted by midnight on Wednesday, Dec. 15th, with the completed Marketing Plan.

The result of this process is a true reflection of each group members' contribution to the project. Students are 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 grades will go up as a result of the peer evaluation. Others may find that their overall project grades will go down. I highly recommend that you discuss the reward system during the first group meeting.

Experience with groups has shown that most troubles arise because (a) individuals do not respect the group process, and (b) there is a lack of proper communication among group members. It is highly recommended **to set group ground rules and expectations at the beginning of the semester.** Groups are also encouraged to have a short feedback session following the completion of each assignment so that individuals will be aware if their input is less than groupmates' expectations.

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 science. 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 a 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.

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.

Use of Turnitin

In this course we will be using a web-based service (Turnitin.com) to reveal plagiarism. Students will be expected to submit their work electronically to Turnitin.com and in hard copy so that it can be checked for academic dishonesty. Students who do not wish to submit their work to Turnitin.com must still submit a copy to the instructor. No penalty will be assigned to a student who does not submit work to Turnitin.com. All submitted work is subject to normal verification that standards of academic integrity have been upheld (e.g., on-line search, etc.). To see the Turnitin.com Policy, please go to:

<http://www.mcmaster.ca/academicintegrity/turnitin/students/>

REQUESTING RELIEF FOR MISSED ACADEMIC WORK

Students may request relief from a regularly scheduled midterm, test, assignment or other course components. Please refer to the policy and procedure on the DeGroot website at the link below:

<http://ug.degroote.mcmaster.ca/forms-and-resources/missed-course-work-policy/>

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 905-525-9140 ext. 28652 or email sas@mcmaster.ca. For further information, consult McMaster University's Policy for Academic Accommodation of Students with Disabilities:

<http://www.mcmaster.ca/policy/Students-AcademicStudies/AcademicAccommodation-StudentsWithDisabilities.pdf>

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

All researchers conducting research that involves human participants, their records or their biological material are required to receive approval from one of McMaster's Research Ethics Boards before (a) they can recruit participants and (b) collect or access their data. Failure to comply with relevant policies is a research misconduct matter. Contact these boards for further information about your requirements and the application process.

McMaster Research Ethics Board (General board): <https://reo.mcmaster.ca/>

Hamilton Integrated Research Ethics Board (Medical board): <http://www.hireb.ca/>

ACKNOWLEDGEMENT OF COURSE POLICIES

Your enrolment in Commerce 3MC3 will be considered to be an implicit acknowledgment of the course policies outlined above, or of any other that may be announced during lectures and/or on Avenue to Learn. **It is your responsibility to read this course outline, to familiarize yourself with the course policies and to act accordingly.**

Lack of awareness of the course policies cannot be invoked at any point during this course for failure to meet them. It is your responsibility to ask for clarification on any policies that you do not understand.

SUBMISSION DEADLINES

The following are the deadlines for the submissions in this course. Late submissions will receive a **ZERO**.

Item	Date	Time	Submit to
Group Signup Form (with the client's signature)	Sept. 26th	Midnight	Electronic copy to Avenue to Learn
Hand-in Case	Oct. 8th	Midnight	Electronic copy to Avenue to Learn
Final Marketing Plan	Dec. 15th	Midnight	Electronic copy to Avenue to Learn
Final Peer Evals (optional)	Dec. 15th	Midnight	Electronic copy to Avenue to Learn

COURSE SCHEDULE – C08		
Week	Monday Two-hour session	Friday One-hour session
Sept. 7 th – 10 th		Course introduction; forming groups
Sept. 13 th – 17 th	Review of marketing concepts; Instruction on case discussions, the hand-in case, and the marketing report	Group Game
Sept. 20 th – 24 th	Case: East Hamilton Miniature Golf – <u>Understand real business concerns</u>	First group meeting
Group Signup Form (with the Client's Signature) is due on Sunday, Sept. 26th midnight		
Sept. 27 th – Oct. 1 st	Case: Wil's Grill – <u>SWOT and Expanding Decision</u>	Wil's Grill (Cont.)
Oct. 4 th – 8 th	Case: Limelight Cinema – <u>Segmentation, Positioning, and Branding</u>	Limelight Cinema (Cont.)
Hand-in Case Report is due by Friday, Oct. 8th midnight		
Oct. 11 th – 15 th	<i>Mid-Term Recess</i>	<i>Mid-Term Recess</i>
Oct. 18 th – 22 nd	Case: Greener Pastures – <u>Targeting and Distribution Channels</u>	Tutoring for the interim presentation (switch to a different time slot)
Oct. 25 th – 29 th	Interim Presentations	Interim Presentations
Nov. 1 st – 5 th	Case: Mountain Man Brewing – <u>Product Strategy</u>	Mountain Man Brewing (Cont.)
Nov. 8 th – 12 th	Case: Metabical – <u>Positioning and Communication Strategy</u>	Metabical (Cont.)
Nov. 15 th – 19 th	Case: Culinarian Cookware: Pondering Price Promotion – <u>Pricing Strategy</u>	Culinarian Cookware (Cont.)
Nov. 22 nd – 26 th	Case: Beauregard Textile Company – <u>Game Theory</u>	Office hour
Nov. 29 th – Dec. 3 rd	Final Presentations	Final Presentations
Dec. 6 th – 8 th	Final Presentations	
Final Report is due by Wednesday, Dec. 15th midnight		

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.

COURSE SCHEDULE – C09		
Week	Tuesday One-hour session	Thursday Two-hour session
Sept. 7 th – 10 th	Course introduction; Forming groups	Review of marketing concepts; Instruction on case discussions, the hand-in case, and the marketing report
Sept. 13 th – 17 th	Librarian Session	Group Game
Sept. 20 th – 24 th	First group meeting	Case: East Hamilton Miniature Golf – <u>Understand real business concerns</u>
<i>Group Signup Form (with the Client's Signature) is due on Sunday, Sept. 27th midnight</i>		
Sept. 27 th – Oct. 1 st	Office Hour	Case: Wil's Grill – <u>SWOT and Expanding Decision</u>
Oct. 4 th – 8 th	Wil's Grill (Cont.)	Case: Limelight Cinema – <u>Segmentation, Positioning and Branding, and Branding</u>
<i>Hand-in Case Report (Tremco Ltd.) is due by Friday, Oct. 8th midnight</i>		
Oct. 11 th – 15 th	<i>Mid-Term Recess</i>	<i>Mid-Term Recess</i>
Oct. 18 th – 22 nd	Tutoring for the interim presentation	Case: Greener Pastures – <u>Targeting and Distribution Channels</u>
Oct. 25 th – 29 th	Interim Presentations	Interim Presentations
Nov. 1 st – 5 th	Office Hour	Case: Mountain Man Brewing – <u>Product Strategy</u>
Nov. 8 th – 12 th	Mountain Man Brewing (Cont.)	Case: Metabical – <u>Positioning and Communication Strategy</u>
Nov. 15 th – 19 th	Metabical (Cont.)	Case: Culinarian Cookware: Pondering Price Promotion – <u>Pricing Strategy</u>
Nov. 22 nd – 26 th	Culinarian Cookware (Cont.)	Case: Beauregard Textile Company – <u>Game Theory</u>
Nov. 29 th – Dec. 3 rd	Final Presentations	Final Presentations
Dec. 6 th – 8 th	Final Presentations	
<i>Final Report is due by Wednesday, Dec. 15th midnight</i>		

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 THE FIRST TWO WEEKS

First 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.

Note: You are expected to do 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 rare that you would have much control over the composition of the workgroup in real life. So, part of the challenge is also to work with the randomness that comes with this process. Conflicts are as much part of working in a group, as are moments of agreement. Your group experience is a success if the net of happiness less unhappiness caused by the group process is positive. 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.

Second Week: Group Work

- Finalize your group;
- Discuss management of group process – Communications, Disputes, Expectations, Penalties, Incentives;
- Discuss the strengths and weaknesses of the project opportunities identified earlier and following your investigations over the week;
- Narrow down project choices from three to one and ask for the professor's permission;
- Decide on how to follow up and contact the firm for the project;
- Fill the group signup form.

Suggested Agenda of the First Group Meeting

- Choose a group coordinator who will facilitate the work;
- Set parameters for group work such as: when and how the group will meet and collaborate;
- 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.);
- Estimate workload of group projects and set a preliminary schedule of how to share work;
- Discuss your expectations of the course and group projects, as well as the reward system;
- Discuss potential clients for the marketing plan project.



B. FORMAT OF HAND-IN CASE WRITE-UP

Your report 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 the 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, and other relevant quantitative analysis should be housed. Appendices not referenced in the body of the report will not be marked. Good English grammar and spelling count, so please edit carefully. Marks will reflect this. Follow the structure given below:

Section	Contents	Weight
Title Page Table of Contents	<ul style="list-style-type: none"> Title of the case, date, Group Number, and names/student numbers of team members Major sections of the paper, and exhibits 	About 1%
Introduction, Problem/Issue Identification, Summary of solution	<ul style="list-style-type: none"> Answer the question "This case is about..." in one short, concise paragraph <u>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 this case.</u> All following sections should be analyzed in the context of the problem/challenge Offer a summary of your strategy with a statement, "We suggest that to address the (problem/issue), the firm should ..." 	About 4%
Marketing Mix (Four Ps)	<ul style="list-style-type: none"> Describe the company's current marketing mix (4P's), using appropriate sub-headings. Remember that the reader knows the case but may not have processed all information. So while simply regurgitating information will not be useful. <u>Identifying the relevance of the information to the task is of value.</u> For details that are only marginally relevant, use the appendix. 	About 15%
Customer Preference / Decision Process; Segmentation, Targeting, Positioning;	<ul style="list-style-type: none"> Discuss market segmentation Address the firm's current target market and quantitatively estimate the size of target market segments as precisely as you can. If you need to make any assumption to facilitate the estimation, please specify the assumption you make <u>Examine customer preferences and relevant concerns in target consumers' purchase decision process. Explain why and how these are relevant</u> Summarize the firm's current positioning strategy. Some of the strategies may not be evident but can be inferred 	About 20%
Strategic Domain Analysis (SWOT - Internal and External Analysis)	<ul style="list-style-type: none"> Provide a critical analysis of the key components of the firm's strategic domain, using subheadings for each of the Strengths, Weaknesses, Opportunities, and Threats. If there are too many points to be addressed, summarize them with a table in the appendices and discuss the key issues in the main body Each key SWOT point should consist of a statement of the company characteristics taken straight from the case and then the implication 	About 20%

Section	Contents	Weight
	<ul style="list-style-type: none"> on the problem/challenge (discussing “So what?”) All information should be taken only from the case. Do not undertake any external research 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. 	
Marketing Strategy (two to three alternatives)	<ul style="list-style-type: none"> Present the details of the prospective marketing strategies (some combination of new/revised target market and/or 4P's) <u>Analyze the pros and cons of each alternative strategy, especially in terms of using strengths, exploiting opportunities, repairing weaknesses, or mitigating threats</u> State which one of the alternative strategies you recommend and justify your choice. In some cases, you might recommend a combination of alternatives to cover shorter and longer planning horizons. 	About 20%
Implementation Plan	<ul style="list-style-type: none"> Timeline of key activities to implement the marketing strategy Each activity contains people, action, money, time, controls, and other relevant considerations Separate into what needs to be done right away and what can wait A preliminary budget estimation, if available Marketing metrics for evaluating performance 	About 10%
Bibliography	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Ten Pages not including title page, table of contents, reference and appendices Typed using a font size of eleven, double-spaced, and with one-inch margins all around. Good grammar and spelling 	About 4%
Integrity of analyses	<ul style="list-style-type: none"> 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 marketing audit, the analysis of customers and market, 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 (15%)

12 minutes (additional five minutes for Q & A / discussion or critique)

The group is expected to present background information about the client and its current marketing practices, along with an analysis of the client's market, including consumer decision process, market segmentation, targeting, and positioning. The group should also identify the client's major business problem and the goal of the marketing project. The following is a full list of content you can cover in the presentation.

1. Introduction to the company, including the main product line(s) and size. You can also address its history, organizational structure, and owner's experience if relevant.
2. The industry size or any significant number trends that are relevant to the business (You may collect information from NAICS / SIC code)
3. Current Marketing Situation: 4P's
 - a. Product: include product lines, service elements, featured products/services, supply capacity constraint (if any), and any other relevant concerns such as best sellers, packaging and delivery, store layout, etc.
 - b. Price: describe the firm's pricing strategies and tactics. Do NOT just list the current prices but compare them with those from the firm's competitors. You are also expected to address contribution margins and key relevant costs.
 - c. Promotion: include detailed spending on sales promotion and communication channels – mass media, flyers, direct mails, digital channels, etc. Explain the effectiveness of the current promotions.
 - d. Place: describe distribution channels, address, map, surroundings, hours of operation.
4. Customers and Target Market
 - a. Segmentation: Explain how the market should be segmented (customers in different segments have different preferences or purchase behaviours, or the firm needs different marketing activities to serve in those segments)
 - b. Targeting: Discuss which market segment(s) the firm currently targets and which it should target; estimate the size of the targeted segment(s); analyze the customers in the targeted segment(s), including the decision-making unit (if relevant), sources of customer values, key decision criteria in the customers' consumption decision-making process.
 - c. Positioning: describe the firm's positioning strategy and summarize relevant practices.
5. Business Problem/Challenge: Identify the firm's major business problem(s) and explain the root causes (internal ones). It will be better if you can quantify the business challenge(s).
6. Goals / Objectives: Identify the objective(s) of your marketing plan. Better to be specific and quantitative.

Due to the time limit, you may not go through all the detailed information in the presentations. I suggest you list details in the slides but address key points in the presentation. Your presentation marks count both content thoroughness and presentation performance. The grading of content is based on the content on your slides. Your slides should be **no more than 20 slides**, excluding the cover page. There is no requirement on the minimum font size, nor minimum line space. But slide appearance counts in grading.



Final presentation (10%):

20 minutes (additional five minutes for Q & A / discussion or critique)

Maximum 20 slides, excluding cover page.

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

1. A brief overview of the first presentation
2. Explain the refined Business Problem(s)/Objectives and the bases of revision if you make changes
3. Analysis of strategic domain. Focus on the significant elements pertaining to the business problem(s) and your suggested plan.
 - a. Company – strength and weakness;
 - b. Consumer – SWOTS related to target consumers such as match and mismatch between consumer preferences and the company's services, size, and preference trends;
 - c. Competitors – general competition environment; specific competition from primary and secondary competitors;
 - d. Collaborators, if relevant – relationships, contracts;
 - e. Context – analyze external environment: Current and estimates of future demand. Relate to Industry trends. Relate to Social / Cultural, Demographic, Economic, Political / Legal and Technological environment
4. Elaborate on two alternative marketing strategies, compare the pros and cons of each alternative strategy, and give your recommendation and rationale.
5. Present a detailed and workable implementation plan of the recommended marketing strategy.

Important notes on presentations

- The presentations are formal events. 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.
- It helps to rehearse a couple of times and review the rehearsal records as a group to see what needs to be improved upon.
- Prepare plan B for potential technique difficulties (Internet connection, video and audio devices, Zoom settings, etc.)
- **All students enrolled in the class are required to attend the presentations no matter your group is presenting or not.**
- You are encouraged to invite your client to come to the presentation. You must inform the professor at least ONE WEEK before the 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.



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 (centered 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 to the company
2. A concise statement of the problem.
3. A short summary of the major points arising from your strategic domain 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 a 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 on 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 background on the company, its owners, its business scale and objectives/missions, the industry sector classification etc. It should be no longer than one page.

MARKETING AUDIT

Offers full details on the 4P's, current target market (Include an estimate / analysis on the size of the market), and critical consumer preferences of target customers. Gives an insight into performance in different sectors, over time periods and highlights trends. ALL current marketing practices (especially those related to the business problem) 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 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, a 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 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. Hence, focus on those highly relevant to the business problem and your suggested solutions.

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
 - ✓ Strengths and weaknesses related to products/services, the brand image in the market, technology and experience, organization structure, business culture, etc.
- Collaborators
 - ✓ Strengths, weaknesses, opportunities, and threats related to distributors, suppliers, and alliances.
- Customers
 - ✓ SWOTs relevant to consumer preferences and target market. Pay attention to the consumption decision-making process and consumption decision-making unit.
 - ✓ If it applies, 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 billion by 2006 ...reference).
- Competitors
 - ✓ Consider both actual and potential, direct and indirect competitors with respect to products/services, positioning, market shares, etc.
 - ✓ Specify and briefly summary the strengths and weaknesses of two major competitors.
- Context
 - ✓ Consider 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 or service. Therefore focus on identifying 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 a 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 organization. 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 organization. The decision must be feasible, given the competitive environment. Discuss to whom you are selling and how you will 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 timeline. 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 the worst/probable/best case scenarios. Ensure that the time period in your implementation matches 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. The font size for the marketing plan body should not be smaller than 11 points. Left / right margins must be no smaller than 1 inch each.
2. The main body of the paper should be double-spaced. The Executive Summary should 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.