Required Materials


2. *Marketing Case Studies* (please see “Case Schedule” – distributed separately - for details). These can be downloaded from study.net for about $50. Visit study.net on the web, navigate to “Notre Dame de Namur University, select “Marketing Planning & Analysis – Spring 2014” and follow instructions for downloading the cases. You may also order a printed textpack for a small extra charge which eliminates the hassle of having to download and print each case.

Course Overview

This introductory course studies the application of marketing as an integrated process. Topics include analysis of markets and customer value, marketing research, consumer behavior and developing a balance in marketing decisions that considers product formulations, prices, channels of distribution and promotion. Note: This course is a prerequisite to enrollment in the Marketing concentration and the Promotion and Media concentration electives.

The course is taught using several different formats, including:

- (1) Lectures on Marketing concepts, methods and examples
- (2) In-class activities requiring active student participation
- (3) Student-led Marketing case presentations and in-class discussions
- (4) A Marketing Plan project that draws on array of course topics

A significant portion of this course is taught seminar-style, meaning that you will learn through active participation in discussions and experiential exercises. You will benefit most from this course by actively preparing for and participating in each class session.
**Typical Class Routine**

Classes will generally stick to the following schedule:

**First Module:** Instructor-led Topic(s) Presentation and Housekeeping  
**BREAK** (10-15 minutes)  
**Second Module:** Student-led case presentation and class discussion of case  
**Third Module:** In-class Activity

Groups presenting cases (discussed in “Marketing Cases” section) should “pre-load” their content during the break to conserve valuable class time.

**Attendance Policy**

Because much of the educational value of this course comes from the in-class experience, excessive absences are discouraged and will severely affect your course participation grade (and probably your other grades too!). We also understand that work and life may prevent you from attending class every now and then, but we ask that you please attend every session that you can.

**Course Goals/Learning Outcomes**

The material presented in Marketing Planning & Analysis provides a framework for answering the following strategic questions: (indicates which Program Outcomes the Course Learning Outcome maps to)

1. What business(es) should we be in and what are our long-term objectives? (PLO # 5)
2. What are our core competencies and competitive advantages and are they sustainable? (PLOs #1 and #5)
3. How should we allocate resources across marketing activities, product lines and segments of the company? (PLOs #1 and #5)
4. What macro- and micro-environmental opportunities and threats do we face? (PLOs #1 and #5)
5. How should we plan and execute the 4 Ps: Product, Promotion, Price and Place? (PLOs #1 and #5)
6. How do we communicate our brand story to consumers in order to maximize our market share? (PLO #3)

Other General Goals of the Course:
This course gives you the opportunity to sharpen your presentation and writing skills and serves as a forum in which you can practice articulating and defending your positions on marketing analysis and strategy. (PLO #3)

The course will emphasize developing qualitative, quantitative and strategic marketing thought using practical examples from various industries such as consumer products, high technology, services, non-profit and global business.

MBA PROGRAM LEVEL LEARNING OUTCOMES:

1. Students will be able to understand, analyze and communicate global, economic, legal, and ethical aspects of business.
2. Students will be able to demonstrate effective leadership and collaboration skills needed to make business-critical decisions, accomplish functional, organizational and professional goals.
3. Students will be able to demonstrate written and oral communication and information literacy competencies that support the effectiveness of strategic planning, marketing and operational activities.
4. Students will be able to evaluate and apply the effective use of technology to optimize business performance.
5. Students will develop comprehensive solutions to business problems by synthesizing and evaluating information using qualitative and quantitative methods of reasoning and analysis.
6. Students apply the NDNU hallmarks (community engagement and social justice) to course curricula.

Hours Distribution

Per federal and WASC accreditation standards, students are expected to devote a total of 180 hours of academic work to a three-unit class.

Hours devoted to each of the major class activities are as follows:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Average Hours Per Week</th>
<th>Total Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lecture Attendance &amp; Participation</td>
<td>3</td>
<td>45</td>
</tr>
<tr>
<td>Text and Case Reading, Case Preparation &amp; Exam Preparation</td>
<td>5</td>
<td>75</td>
</tr>
<tr>
<td>Marketing Plan Project Research, Write Up &amp; Presentation Preparation</td>
<td>4</td>
<td>60</td>
</tr>
<tr>
<td><strong>Total Hours</strong></td>
<td></td>
<td><strong>180</strong></td>
</tr>
</tbody>
</table>

Grading

Group Case Presentation 30% (all group members receive same grade)
Midterm Exam 30%
Marketing Plan Project 30%  (all group members receive same grade)
Class Participation 10%
Total 100%

Note: Group members are expected to contribute equally when working on the Case Presentation and the Marketing Plan Project. An individual student’s grade may be penalized if other group members agree that the student has not made an attempt to contribute equally towards the completion of the project. You may work individually on any “Group” project with the instructor’s permission.

This course uses the 360° Evaluation Method.

ACADEMIC HONESTY: Academic honesty is a cornerstone of our values at NDNU. If any words or ideas used in an assignment submission do not represent your original words or ideas, you must cite all relevant sources and make clear the extent to which such sources were used. Words or ideas that require citation include, but are not limited to, all hard copy or electronic publications, whether copyrighted or not, and all verbal or visual communication when the content of such communication clearly originates from an identifiable source. Consult the NDNU Student Handbook regarding consequences of misrepresenting your work.

PRIVACY and CONFIDENTIALITY: One of the highlights of the NDNU academic experience is that students often use real-world examples from their organizations in class discussions and in their written work. However, it is imperative that students not share information that is confidential, privileged, or proprietary in nature. Students must be mindful of any contracts they have agreed to with their companies.

LEARNING and OTHER DISABILITIES: If you have a learning disability or other condition or circumstance that requires accommodations in this class, you must bring it to the attention of Program for Academic Support and Services (PASS) as soon as possible. Appropriate accommodations (evidence of a disability must be in writing) will be facilitated through the office of PASS. Please contact Peggy Koshland-Crane at 508-3670.

SYLLUBUS UPDATES: Refer to this syllabus for course assignments. However the course syllabus and schedule are subject to change in the event of extenuating circumstances. Your will be notified of any changes made to the syllabus. In all circumstances University policies will be strictly adhered to.
Marketing Cases

A major educational component of the course entails analyzing (mostly HBS) case studies in Marketing. Everyone should read the assigned case for the week before coming to class. An assigned case group (1-4 people) will present the case in class and allow ample time for discussion afterwards.

You are responsible for reading and preparing each and every assigned case, even if your group is not presenting that week. You may be called upon for your opinion, analysis or recommendation whether you are presenting or not. Come prepared!

Cases have been chosen for their readability, timeliness and relevance to the course syllabus. They generally correspond to the particular course topic being covered that week, but you should never expect a perfect overlap. As in “real life”, most cases present a multitude of Marketing issues that cannot be neatly channeled into one particular topical area (such as simply a “pricing case” or just a “communication strategy case”). You should view the challenges facing the company as holistically as possible which is a key skill that becomes increasingly important in your career as you advance to higher levels of responsibility.

Though each case may involve a different set of Marketing issues, the following questions will usually apply to each case:

1. What is (are) the main issue(s) facing the organization? Look at the syllabus’s “Orienting Questions” as well as the questions posed within the case for hints.
2. What are the options available to the organization?
3. What is your recommendation? Provide a justification for your choice and why you decided against the other alternatives.
4. Be sure to answer the Orienting Questions asked in the syllabus. (this will almost always overlap significantly with #1-3)
5. Identify what can we learn from the case as it relates to Marketing in general (i.e. go beyond the company or particular marketing decision presented in the case)? What key take-aways and Marketing wisdom can you offer the class?

Start by giving the class a brief background on the company and the situation it faces but spend the bulk of your time communicating your analysis of the problem and your resulting recommendations. You may consult outside references, but realize that most (if not all) of the information needed to present the case can be found within the case. Also, for the purposes of this class, do not concern yourself with how the company actually dealt with the challenge or opportunity (i.e. their actual decision). What’s more important are YOUR solution ideas and how you relate them to the class.

The point of the assignment is to get you focused on (1) recognizing the key Marketing issues facing the company and (2) formulating a plan for how the company should proceed, and (3) identifying the key Marketing take-aways that transcend this particular case’s circumstances.
WARNING: Groups who merely provide a summary of the case background and issues will not receive a satisfactory grade on this assignment. Everyone has read the case and knows the facts. Your analysis, recommendations and Marketing insight are what you should share with the class. Enlighten us with your Marketing wisdom.

The following Case Analysis Guide provides additional perspective on how to approach case analysis, though some of these pointers may NOT be relevant to your case analysis.

Case Analysis Guide: How to Analyze a Case

What’s the problem? (Common marketing problems include: Should the firm enter or not enter a business area [go-no go decisions], choice of entering one area or another area (product decisions; market decisions), which (and how many) customer group(s) to target, how to retaliate against or attack competition (proactively/defensively), how to position a brand, whether to conduct market research, and if so what type of research to conduct, how to allocate the budget between various promotional media or sales, decisions regarding changes or continuation in distribution channels, brand names, what price(s) to charge, what type of advertising to run, media decisions, etc.)

What are the decision alternatives? (These are usually implicitly or explicitly provided in the case, but you should feel free to go beyond those that are given)

What are the company’s strengths and weaknesses? (Examples of areas that could be strengths or weaknesses include: brand name, customer franchise, costs of production, experience, suppliers, distribution channels, financials, technology, and operations etc.)

What are the environmental opportunities and threats? (These include changes in the overall environment such as changes in the economy, socio-political climate, customer demographics, government regulations, consumer attitudes, competitive environment, technology, globalization etc.)

How can one assess the pros and cons of each of the decision alternatives against the backdrop of company strengths/environmental opportunities, keeping competitive considerations in mind? These include quantitative analyses such as short-term and long-term breakeven analysis, profitability of different decisions, and sensitivity of profitability to alternate scenarios depending on assumptions about unknown variables (e.g., market size); as well as qualitative analyses such as fit with the company strengths, fit with existing opportunities, likelihood of competitive retaliation etc.

THEN make a decision. (Justify it in terms of the analysis above – NOT the other way around). Ideally a chosen decision should be justified in terms of whether (and how) it leverages the company’s strengths and environmental opportunities better than the other options available.

* There are no right or wrong decisions, just incomplete or complete analyses. *

DELIVERABLES: Time your presentations to last no longer than 25 minutes. There is no need to hand in a separate write-up of any kind, but please submit a printed copy of your Powerpoint/Prezi presentation to me right before you present.
Your grade will be based primarily on the insightfulness and thoroughness of the key ideas and themes you develop and the analysis you use to justify them. Presentation dynamics (i.e. organization, visuals, etc.) are important but are less important than the educational value, marketing insight and solutions-focused creativity you develop and share with the class. Be sure to focus your efforts on identifying, analyzing and resolving key issues instead of on creating beautiful presentations!

“The content is the thing.” (Shakespeare, with a slight modification by Jordan, 2013)

Class Participation

Participation enriches the quality of your learning experience and constitutes 10% of your final grade. For effective class participation it is imperative that you read and critically evaluate the assigned materials before each class.

Effective class participation includes your 1) asking questions about concepts you don’t understand, 2) agreeing or disagreeing with propositions made in class by the instructor, classmates, text, etc. 2) sharing your experience or point of view with the class, 3) building on points raised by others, and/or 4) relating topics discussed to previous class discussions, exercises, lectures or cases.

We value the quality of your participation over the quantity. Please aim to make comments that are relevant and insightful.

Feel free to ask me about your class participation quality at any point in the semester. I am happy to provide feedback.

Midterm Exam

The midterm will cover all material (including in-class exercises and cases) presented in the first half of the course (roughly sessions 1-7). This “closed-book” exam will last the entire duration of the class period. I will discuss the details of the exam in class.
Marketing Plan Project

This project gives you the opportunity to apply the entire array of Marketing topics presented in the course to solving a strategic marketing problem. You can choose a currently existing company and/or product or create one for the purposes of this assignment, however if you choose the former, you may not simply reproduce an action plan that has already been implemented by an organization or one that is currently being implemented to such an extent that the information is publicly or privately available to you. *The point of the assignment is to give you experience creating an innovative Marketing strategy from scratch.*

All projects should follow the typical six-section Marketing Plan format *:

I: Executive Summary (one page maximum)
II: Situation Assessment and Analysis
III: Market Summary
IV: Marketing Strategy
V: Financial Projections and Analysis
VI: Controls and Evaluation of Effectiveness

* Please consult your text for further details on each of the sections.

Two project deliverables are required: (1) a Written Report, and (2) a Powerpoint Presentation.

The Written Report should be composed in a narrative format (i.e. coherent paragraphs with clear section headings), though you are encouraged to use simple bullet-point lists where appropriate. *Most important: Be concise and do not repeat yourself!*

Your Powerpoint Presentation should cover the highlights of your more extensive written plan. This part of the project gives you practice condensing your ideas into a brief “sales pitch” format that has become the norm in business presentations today.

There is no maximum or minimum page requirement for the Written Report component of the project. You may use any stylistic format (i.e. fonts, margins, typeface size, etc.) you desire as long as you follow the six-section outline format provided above. But always adhere to the golden rule of business brevity: *the shorter, the better.*

Grades will be based on the thoroughness, creativity and cohesiveness of each of your plan sections, as well as on whether the plan presents a holistically cogent case for your platform of ideas. *Groups must hand in a printed copy of both the Powerpoint Presentation and the Written Report at the time of presentation (i.e. the last class).*

Note: A project checkpoint is scheduled shortly after the semester midpoint to ensure that your group is making adequate progress towards project completion. Please come prepared with a rough outline for each section. The more information you provide, the more I can help!
MARKETING PLANNING & ANALYSIS
COURSE SCHEDULE
Spring 2014

January 14

TOPIC(S):
• Introduction to Marketing Management
• Marketing Strategy

Kotler/Keller Chapters: 1, 2

In-class Activity: Organizational Core Competencies and Value Creation

CASE: None

January 21

TOPIC(S):
• The Marketing Environment
• Marketing Research and Demand Forecasting

Kotler/Keller Chapters: 3, 4

In-class Activity: Laddering Techniques / Consumer Interviews

CASE: None

January 28

TOPIC(S):
• Customer Value, Satisfaction and Loyalty
• Consumer Behavior

Kotler/Keller Chapters: 5, 6

In-class Activity: Consumer Behavior Exploration: Why We Buy

CASE: See Case Schedule

February 4

TOPIC(S):
• Market Segmentation and Targeting
• Brand Positioning

Kotler/Keller Chapters:  8, 10

In-class Activity:  Creating a Segmentation, Targeting and Positioning Scheme

CASE:  See Case Schedule

February 11

TOPIC(S):
• Brand Strategy
• Competitive Strategy

Kotler/Keller Chapters:  9, 11

In-class Activity:  Perceptual Position Maps / Valuing a Brand

CASE:  See Case Schedule

February 18

TOPIC(S):
• Product Strategy
• Service Strategy

Kotler/Keller Chapters:  12, 13

In-class Activity:  Demand Estimation and Contribution Analysis

CASE:  See Case Schedule

February 25

MIDTERM EXAM

DETAILS TBA

March 4 – Spring Break – No Class
March 11

TOPIC(S):
• Pricing Strategy
• Supply Chains, Channels and Logistics

Kotler/Keller Chapters: 14, 15

In-class Activity: Conducting a Price and Profit Sensitivity Analysis

CASE: See Case Schedule

March 18

TOPIC(S):
• Integrated Marketing Communications I

Kotler/Keller Chapters: 17

In-class Activity: Marketing Plan Project Checkpoint

CASE: See Case Schedule

March 25

TOPIC(S):
• Integrated Marketing Communications II

Kotler/Keller Chapters: 18, 19

In-class Activity: Advertising Activity

CASE: See Case Schedule

April 1

TOPIC(S):
• New Offerings and Product Launches
• Market Expansion Strategy

Kotler/Keller Chapters: 20

In-class Activity: Advertising Activity

CASE: See Case Schedule
April 8

TOPIC(S):
• Global Marketing

Kotler/Keller Chapters: 21

In-class Activity: Advertising Activity

CASE: See Case Schedule

April 15

TOPIC(S):
• Marketing Ethics and the Sustainable Organization
• Wrap Up

Kotler/Keller Chapters: 22

In-class Activity: Ethics Debate, Final Guidance on Marketing Plan Project

CASE: See Case Schedule

April 22

MARKETING PLAN PROJECT PRESENTATIONS

DUE: Marketing Plan Presentation & Paper

Note: Course schedule may be modified to accommodate student requests, class reschedulings, guest speakers, etc. Instructor will notify students by e-mail and in class in the event of a change.