



## **Marketing 425 – Strategic Marketing**

MKTG-425-03 / CRN# 21919

Spring 2020

### **Contact Information**

Instructor: Douglas Boyle  
Adjunct Professor

Cell Phone: 713-853-7799 (9am-5pm weekdays)  
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Office Hours: Mondays 2:45-3:45pm. Please email or text to set a F2F appointment.  
Available for email or phone discussions most weekdays

### **Class Sessions**

Tate Center – Room #315  
Mondays 4:00-6:45pm

### **Course Objectives**

This course is designed to develop skills in the formulation and implementation of Marketing Strategy. Following completion of the course, the student should be able to:

- Assess a market and develop a strategy for a given product. Emphasis is placed on designing strategies that create sustainable competitive advantage and provide a good fit with the market environment & company objectives.
- Translate your strategy into an efficient and effective marketing mix plan (price, product, promotion and placement), aligned with corporate strategy.
- Adopt 'forward' approach to future business development, seizing opportunities for innovation and using performance management to deliver results.

### **School of Business Learning Goals**

The Strategic Marketing course is also designed to support student development in the following areas:

- Communication skills: Students demonstrate the ability, via both written and spoken work, to effectively present, critique, and defend ideas in a cogent, persuasive manner.
- Quantitative fluency: Students demonstrate competency in logical reasoning and data analysis skills.
- Global and Civic responsibility: Students identify and define social, ethical, environmental and economic challenges at local, national and international levels. Students integrate knowledge and skills in addressing these issues.
- Intellectual innovation and creativity: Students demonstrate their resourcefulness and originality in addressing extemporaneous problems.
- Synthesis: Students demonstrate the ability to integrate knowledge from multiple disciplines incorporating learning from both classroom and non-classroom settings in the completion of complex and comprehensive tasks.

### **Learning Method**

The course focuses on applying core marketing concepts to practical, real-world situations. The textbook and published articles, along with the professor's presentations, will provide the core concepts. Students then practice application through a combination of case studies, in-class discussion and exercises, and a multi-session marketing simulation.

Students will work individually on all assignments with the exception of the marketing simulation, which will be a team project replicating the team nature of most strategy development efforts.

## Course Materials

The 3 MKTG 425 sections use similar materials for much of the reading and simulation exercise. These include:

- **Textbook:** Walker & Mullins' "Marketing Strategy: A Decision-Focused Approach" (8<sup>th</sup> edition) provides an excellent framework for understanding how marketing strategy varies according to the environment scenarios. The text is available at no cost at the following site: [https://www.academia.edu/16221233/Marketing\\_Strategy\\_A\\_Decision-Focused\\_Approach\\_Eight\\_Edition](https://www.academia.edu/16221233/Marketing_Strategy_A_Decision-Focused_Approach_Eight_Edition). You may need to register to enable download but Academia is a reputable site.
- **Course Pack:** Four cases have been selected for case reports; each one addresses a different topic (Market Analysis, Positioning, Mature Markets and Portfolio Management). Additionally, a 'teaching case' has been selected to provide example for Customer Analysis. Harvard Business Press articles also supplement the Walker/Mullins text, which does not cover some sections effectively. The HBP materials are listed on page 11 of the Syllabus and are available at the following site: <https://hbsp.harvard.edu/import/675162>
- **Presentations:** Copies of the Professor's presentation slides will be available at the course site on Oaks approximately 1 week before each class session.
- **Simulation:** The "Strategic Marketing Simulation: Bikes" from Marketplace Live will be used throughout the last half of the course. Each student will need to register for the simulation using the course and team identification information provided in-class.

## Course Overview

The course focuses on applying core marketing concepts to practical, real-world situations. There are 4 major sections to the course and key concepts will be reinforced in the 2<sup>nd</sup> half through a marketing simulation.

Section	Session #	Topics
1. Corporate & Brand Strategy	1	Course Overview. Market Analysis
	2	Customer Analysis. Marketing Strategy Framework
	3	Targeting & Positioning
2. Financial & Planning Tools	4	Marketing Financial Analysis
	5	Marketing Planning
3. Environmental Scenarios	6	New Market Entry
	7	Growth Markets
	8	Mature & Declining Markets
	9	Digital Disruption
4. Management Opportunities/Risks	10	Pricing & Portfolio Management
	11	Marketing Ethics
	12	Implementing & Controlling Plans
	13	Course Summary & Wrap-up

Bikes Simulation

## Grading

Course grading will be based on the following criteria and weighting:

Grade Component	% Weighting	
Class Participation	10%	
Case Reports (4 x 8%)	32%	
Examinations	} 33%	
• Financial Analysis & Planning exercises (2 x 4%)		8%
• Mid-Term Exam		5%
• Final Exam		10%
• ETS Major Field Test	10%	
Bikes Simulation ( <b>Team</b> )	} 25%	
• Marketing Plan (Quarters 5-8)		15%
• Performance (Quarters 5-8)		5%
• Hand-off memo & presentation		5%

Case reports and Examinations will be individual exercises (as is the class participation assessment); only the Bike Simulation will be a team assessment exercise. Guidance on each component follows:

- **Case Reports**

Case study provides an excellent opportunity to apply course learning to a real-world situation. Each case has been selected to highlight one particular aspect of Marketing Strategy development or implementation. The learning sequence will be to review the relevant theory in class (e.g. portfolio management), follow it with a case study and report focusing on an aspect of the theory (e.g. line extensions), and then discuss the case in the following class session.

The schedule of case reports, questions and due dates is listed below.

Topic	Case	Questions for Report	Due Date (400PM @ Oaks)
Corporate Strategy	Lidl: A German Grocer in the US	<i>"Using Porter's 5+1 Forces model, assess the US Grocery industry and implications for Lidl?"</i>	Jan 27
Brand Positioning	Saxonville Sausage	<i>"Which positioning do you recommend for Vivio and why?" (Please address brand name, positioning statement and any product, package, communications or other guidance)</i>	Feb 10
Mature Market Management	Hunley, Inc	<i>"Assess the Titaluk and Walmart opportunities strategically &amp; financially. What should CW3 do?"</i>	Mar 23
Portfolio Management	Whiskey and Cheddar	<i>"Should Caesan launch the Jameson branded product or one using generic whiskey?" (Please address from a strategic and financial standpoint)</i>	Apr 6

Case reports should be drafted in line with the following guidelines:

- Reports should be 2-3 pages in length, exclusive of appendices. They should use a reasonable format (1.0+ line spacing with normal font). Please use appendices to visualize your argument or provide data tables, applying good judgment on overall length.
- Case reports must be uploaded to the course Dropbox on Oaks by the start of the class session (4:00pm ET) on the date outlined above. As the case will be discussed in the class session, no late submissions will be accepted.
- Cases are meant to be assessed and actioned with only the information given in the case. Please do not do any additional research on the company as part of your preparation.
- All Case reports are individual assignments. Recommendations in your reports should be based on individual analysis and assessment only.

- **Examinations**

There are 2 quantitative exercises and a Mid-Term & Final Examination focused on MKTG 425 content:

- Marketing Financial Analysis Exercise (4% of course grade): **Held in-class** during Session 5 (Feb 17). Assesses understanding of financial analysis and marketing return metrics through 4 exercises.
- Marketing Planning Exercise (4% of course grade): **Homework assignment** due to Oaks prior to Session 6 (Feb 24). Assesses ability to build a financial forecast based on integrating selected initiatives.
- Mid-Term Examination (5% of course grade): **Held in-class** during Session 7 (Mar 2). Assesses understanding of material through Session 6 using multiple choice & short-answer questions.
- Final Examination (10% of course grade): **Held during Finals week** – the time slot for our course is Monday, April 27<sup>th</sup>, starting at 7:30pm. Session 13 (Apr 22). Assesses understanding of entire course material using multiple choice, short-answer & calculation format questions.

Together, these examinations represent 23% of course grade.

In addition to the MKTG 425 exams, the ETS Major Field Test is required of all School of Business Seniors and must account for 10% of the capstone course grade. The ETS Major Field Test is a two-hour multiple-choice test administered to graduating students assessing mastery of general business concepts, principles, and knowledge. The test also evaluates students' abilities to analyze and solve problems, understand relationships, and interpret material. The content area includes: accounting, economics, management, quantitative business analysis, information systems, finance, marketing, legal and social environment, and international issues.

The ETS test is also an important evaluation for the School of Business which uses the learning data to improve courses and programs, helping to make students more competitive in today's job market. The aggregate data, analysis of the data, recommendations for program improvement and follow-up assessment are reported to our accrediting agencies. We have longitudinal comparative data from 2006 to the present.

Direct benefits of the ETS Major Field Test for the student includes the opportunity to add high percentile scores to your resume or application letters, and the indirect benefit of enhancing the value of your School of Business degree (as the School's reputation grows). **Per School policy, seniors in the capstone courses are required to take the ETS Major Field Test.**

- **Strategic Marketing Simulation: Bikes**

The Bikes simulation gives the student experience in marketing strategy formulation, marketing mix management and responding to changing competitive dynamics over a two-year timeframe. The simulation will be conducted on a team basis, allowing some sharing of the analysis and planning work, and replicating how management teams operate. Students will form their own teams with a target size of 3 or 4 individuals.

Additional information about the simulation and how to gain access will be shared in class session and on Oaks. You will be required to use the course, game and team identification numbers provided, so don't enroll independently. The following link provides an overview if you want to understand the simulation better in the meantime:

<http://www.marketplace-simulation.com/strategic-marketing-bikes-demo>

Grading for the simulation is comprised of 3 elements:

- Marketing Plan (15% of course grade): The Final Plan is due by 400pm on Thursday, March 12<sup>th</sup> and should be submitted to the course Dropbox. From a simulation standpoint, the Plan is submitted following receipt of 4<sup>th</sup> Quarter results, and covers the coming year (Q5-Q8).

The Plan should be *4-5 pages in length (+ appendices)* and follow the format that will be reviewed in class. As the Plan is the single largest component to the overall course grade, I will review Draft Plans submitted before 400pm on Thursday, March 5<sup>th</sup> and provide feedback to the teams for improvement by the class meeting on March 9<sup>th</sup>.

- Performance (5% of course grade): Performance is assessed over the Q5-8 timeframe using the simulation's balanced scorecard that includes financial performance, market share, customer satisfaction, brand quality perception and return on investment.
- "Hand-off" memo & presentation (5% of course grade): Congratulations! After two years as Strategy Manager for Bikes, it's time to move your next assignment. The "Hand-off" memo is a *3-page memo* to written to your successor addressing three questions:
  1. What was your key learning regarding the Strategy outlined in your Plan?
  2. How should the Strategy evolve going forward? What are the key success factors?
  3. What are your recommended customer & financial goals for the coming year (Q9-12)?

Additionally, each team will give a 5-7 minute presentation during the final class session (April 20<sup>th</sup>) addressing Questions #1-2 above on two slides. Templates for the presentation and coming year goals will be provided in class. Both the Hand-off Memo and Presentation are due by 400pm on Monday, April 20<sup>th</sup> and should be submitted to the course Dropbox.

The schedule for Bikes Simulation decisions and submissions is summarized below:

Action	Date due (4pm)
Q1 decision	Wed, Feb 19
Q2 decision	Sat, Feb 22
Q3 decision	Thurs, Feb 27
Q4 decision & Draft Plan	Thurs, Mar 5
Q5 decision & Final Plan	Thurs, Mar 12 ( <i>Plan to Dropbox</i> )

Action	Date due (4pm)
Q6 decision	Thurs, Mar 26
Q7 decision	Thurs, Apr 2
Q8 decision	Thurs, Apr 9
Hand-off Memo & Presentation	Mon, Apr 20 ( <i>to Dropbox</i> )

- **Participation in Class discussion**

Active involvement in class discussion is critical to your learning and the learning of other students (and worth 10% of overall course grade). Quality of contribution is more important than quantity, but top grades will be provided for comments such as:

- Insightful diagnosis of root cause issues or anticipation of problems
- Relating the reading or case study to your own experiences or observations
- Proposing potential solutions with rationale and key success factors
- Building on other student comments & proposals, either as an enhancement or constructive challenge

Each student's contributions will be evaluated after each session against the following rating standard:

- ◇ Non-Participant: Present but did not contribute or missed class. No participation credit for grading purposes.
- ◇ Minimal Contributor: Ideas offered were not substantive or not particularly constructive. Little new perspective added.
- ◇ Good Contributor: Active and constructive contributions provided. Good preparation and reflection on theory or cases evident. Arguments well substantiated.
- ◇ Outstanding Contributor: Contributions reflect exceptional preparation and insight, connecting material to broader business context. Arguments are well substantiated and persuasive.

## **Policies**

The following policies will apply to the course:

- **Attendance**

A sign-in sheet will be used in each session – *please remember to sign-in at the start of each class!*

Because attendance is crucial to fully understanding strategic marketing principles and benefiting from classroom discussion on practical application, students are expected to attend all classes. To minimize gaming, the only 'excused' form of absence is when a student is acting as an official representative of the College (e.g. academic or athletic competition). Regarding assignments due during excused absences: Case reports should be handed in prior to leaving as the solution will be discussed in class; reasonable accommodation will be made to reschedule exam times if conflicted.

Students are allowed one 'unexcused' absence for the course (one of the 14 sessions) for any other reason. Please contact me as early as possible when you determine that you will need to miss a class – I appreciate the notice and it gives us an opportunity to discuss assignments or class topics.

Students should expect to receive a Withdrawn Excessive Absences (WA) grade if they have two or more 'unexcused' absences.

- **College of Charleston Honor Code and Academic Integrity**

Lying, cheating, attempted cheating, and plagiarism are violations of our Honor Code that, when identified, are investigated. Each incident will be examined to determine the degree of deception involved.

Incidents where the instructor determines the student's actions are related more to a misunderstanding will be handled by the instructor. A written intervention designed to help prevent the student from repeating the error will be given to the student. The intervention, submitted by form and signed both by the instructor and the student, will be forwarded to the Dean of Students and placed in the student's file.

Cases of suspected academic dishonesty will be reported directly by the instructor and/or others having knowledge of the incident to the Dean of Students. A student found responsible by the Honor Board for academic dishonesty will receive a XF in the course, indicating failure of the course due to academic dishonesty. This grade will appear on the student's transcript for two years after which the student may petition for the X to be expunged. The student may also be placed on disciplinary probation, suspended (temporary removal) or expelled (permanent removal) from the College by the Honor Board.

Students should be aware that unauthorized collaboration--working together without permission-- is a form of cheating. Unless the instructor specifies that students can work together on an assignment, quiz

and/or test, no collaboration during the completion of the assignment is permitted. Other forms of cheating include possessing or using an unauthorized study aid (which could include accessing information via a cell phone or computer), copying from others' exams, fabricating data, and giving unauthorized assistance. Research conducted and/or papers written for other classes cannot be used in whole or in part for any assignment in this class without obtaining prior permission from the instructor.

Students can find the complete Honor Code and all related processes in the *Student Handbook* at <http://studentaffairs.cofc.edu/honor-system/studenthandbook/index.php>

- **Cell Phones, Laptops & Tablets**

Cell phones should be turned off during class session. Please let me know prior to class if you are facing extraordinary circumstances and need to keep your phone on. Laptop and Tablet computers should be kept in a closed position during class session.

- **Disability**

Please contact me if you have a disability that will impact your work in this course. I am happy to accommodate student needs in any way required. Students will need to apply to the SNAP Office (Lightsey Center, Suite 104) for approval, but am familiar with working through their systems and procedures. My preference on testing accommodation is to have all tests completed prior to the following session (one week later) so that I can share learning to the overall class.

- **Weather or Other Emergency**

If the College of Charleston closes and members of the community are evacuated due to inclement weather, students are responsible for taking course materials with them in order to continue with course assignments consistent with instructions provided by faculty. In cases of extended periods of institution-wide closure where students have relocated, instructors may articulate a plan that allows for supplemental academic engagement despite these circumstances.

I will make every effort to keep you up-to-date on course plans consistent with school guidance.

**Course Schedule – Sessions # 1 – 4**  
*All Class Sessions held in Tate Center #315, 4:00-6:45pm*

<p><b>Session 1</b> Monday, January 13</p>	<p><b>Topics:</b></p> <ul style="list-style-type: none"> <li>• Course Introduction &amp; Overview</li> <li>• Corporate &amp; Business Strategy</li> <li>• Market Analysis</li> </ul>	<p><b>Reading:</b></p> <ul style="list-style-type: none"> <li>• Casadesus-Masanell, “Core Curriculum: Introduction to Strategy”</li> <li>• WSJ: Shampoo Giants Go Head-to-Head</li> <li>• Professor’s slides <i>(posted to Oaks 1 week prior to class)</i></li> </ul>
<p><b>Learning Objectives:</b></p> <ul style="list-style-type: none"> <li>• Outline the scope, flow and requirements of the Strategic Marketing course.</li> <li>• Understand the key elements of a Corporate and Business strategy, and how they shape Brand strategy</li> <li>• Be able to assess a market’s attractiveness and the key forces driving rivalry</li> </ul>		<p><b>Assignments:</b></p> <p><i>No assignment due for this class</i></p>
<p><b>Session 2</b> Monday, January 27</p>	<p><b>Topics:</b></p> <ul style="list-style-type: none"> <li>• IKEA case discussion</li> <li>• Customer Analysis</li> <li>• Competitive, Collaborator &amp; Company Analysis</li> </ul>	<p><b>Reading:</b></p> <ul style="list-style-type: none"> <li>• Boyle, “Note on Customer Analysis”</li> <li>• Quelch, “Crescent Pure” case</li> <li>• Nafees, et al, “Lidl: A German Grocer in the US” case</li> <li>• Professor’s slides <i>(posted to Oaks 1 week prior to class)</i></li> </ul>
<p><b>Learning Objectives:</b></p> <ul style="list-style-type: none"> <li>• Understand the key components of a 4Cs Analysis: Customer, Competitive, Collaborator and Company</li> <li>• Be able to identify a good segmentation framework.</li> </ul>		<p><b>Assignments:</b></p> <p><u>Case Report:</u> “Using Porter’s 5+1 Forces model, assess the US Grocery industry and implications for Lidl?”</p> <ul style="list-style-type: none"> <li>– Due to Dropbox before class start (400pm, Jan 27)</li> </ul> <p>See page 3 for further guidance on paper format</p>
<p><b>Session 3</b> Monday, February 3</p>	<p><b>Topics:</b></p> <ul style="list-style-type: none"> <li>• Targeting &amp; Positioning</li> </ul>	<p><b>Reading:</b></p> <ul style="list-style-type: none"> <li>• Gupta, “Core Curriculum: Segmentation &amp; Targeting”</li> <li>• Steenburgh, “Toolkit: Market Size &amp; Market Share”</li> <li>• Professor’s slides <i>(posted to Oaks 1 week prior to class)</i></li> </ul>
<p><b>Learning Objectives:</b></p> <ul style="list-style-type: none"> <li>• Understand the strategic significance of the targeting decision</li> <li>• Practice development of Positioning statements, including identification of differentiated value propositions and appropriate competitive context.</li> </ul>		<p><b>Assignments:</b></p> <p><i>No assignment due for this class</i></p>
<p><b>Session 4</b> Monday, February 10</p>	<p><b>Topics:</b></p> <ul style="list-style-type: none"> <li>• Crescent Pure case discussion</li> <li>• Marketing Financial Analysis</li> </ul>	<p><b>Reading:</b></p> <ul style="list-style-type: none"> <li>• Dolan, “Low Tech Marketing Math”</li> <li>• Steenburgh, “Toolkit: Pricing &amp; Profitability Analysis”</li> <li>• Moore, “Saxonville Sausage Company” case</li> <li>• Professor’s slides <i>(posted to Oaks 1 week prior to class)</i></li> </ul>
<p><b>Learning Objectives:</b></p> <ul style="list-style-type: none"> <li>• Discuss conclusions from the Crescent Pure case analysis.</li> <li>• Develop an understanding of key financial metrics and performance measures used in Marketing assessment</li> </ul>		<p><b>Assignments:</b></p> <p><u>Case Report:</u> “Which positioning do you recommend for Vivio and why?” <i>(Please address brand name, positioning statement and any product, package, communications or other guidance)</i></p> <ul style="list-style-type: none"> <li>– Due to Dropbox before class start (400pm, Feb 10)</li> <li>– See page 3 for further guidance on paper format</li> </ul>

**Course Schedule – Sessions # 5 – 8**  
*All Class Sessions held in Tate Center #315, 4:00-6:45pm*

<p><b>Session 5</b> Monday, February 17</p>	<p><b>Topics:</b></p> <ul style="list-style-type: none"> <li>• Financial Exercise (1<sup>st</sup> 45 minutes of class)</li> <li>• Marketing Planning</li> <li>• Bike Simulation intro</li> </ul>	<p><b>Reading:</b></p> <ul style="list-style-type: none"> <li>• Note on Financial Forecasting</li> <li>• Professor's slides (<i>posted to Oaks 1 week prior to class</i>)</li> </ul>
<p><b>Learning Objectives:</b></p> <ul style="list-style-type: none"> <li>• Assess understanding of Marketing Financial Analysis through in-class exercise.</li> <li>• Build understanding of importance of Marketing Planning and key methods for developing forecast projections</li> <li>• Introduce Bike Simulation and how it will work</li> </ul>		<p><b>Assignments:</b></p> <p>Enroll in "Strategic Marketing Simulation: Bikes" and review introductory materials</p> <p><u>Before Wed, Feb 19 (400pm):</u> Complete Q1 decision</p> <p><u>Before Sat, Feb 22 (400pm):</u> Complete Q2 decision</p>
<p><b>Session 6</b> Monday, February 24</p>	<p><b>Topics:</b></p> <ul style="list-style-type: none"> <li>• Marketing Planning Exercise</li> <li>• New Market Entry</li> <li>• Simulation Q1 &amp; Q2 results</li> </ul>	<p><b>Reading:</b></p> <ul style="list-style-type: none"> <li>• Walker/Mullins, Chapter 8</li> <li>• Gourville, "Four Products: Predicting Diffusion (2018)"</li> <li>• Professor's slides (<i>posted to Oaks 1 week prior to class</i>)</li> </ul>
<p><b>Learning Objectives:</b></p> <ul style="list-style-type: none"> <li>• Discuss learning from the Marketing Planning exercise. Review Financial Exercise results.</li> <li>• Understand typical business objectives, environmental considerations and tactics used in new market entries.</li> </ul>		<p><b>Assignments:</b></p> <p><u>Marketing Planning Exercise:</u> "What is the forecast for Year 3 unit volume, revenue, gross margin and operating profit?" (Details provided in Session 5)</p> <ul style="list-style-type: none"> <li>- Due to Dropbox before class start (400pm, Feb 24)</li> </ul> <p><u>Before Thurs, Feb 27 (400pm):</u> Complete Simulation Q3 decision</p>
<p><b>Session 7</b> Monday, March 2</p>	<p><b>Topics:</b></p> <ul style="list-style-type: none"> <li>• Mid-Term Exam</li> <li>• Growth Market strategies</li> <li>• Simulation Q3 results</li> </ul>	<p><b>Reading:</b></p> <ul style="list-style-type: none"> <li>• Walker/Mullins, Chapter 9</li> <li>• Ad Age: Kind Eliminates 90 Field Jobs</li> <li>• Professor's slides (<i>posted to Oaks 1 week prior to class</i>)</li> </ul>
<p><b>Learning Objectives:</b></p> <ul style="list-style-type: none"> <li>• Assess understanding of course material to-date through Mid-Term Examination.</li> <li>• Understand typical business objectives, environmental considerations and tactics used in growth markets</li> </ul>		<p><b>Assignments:</b></p> <p><u>Before Thurs, Mar 5 (400pm):</u> Complete Simulation Q4 decision and submit Draft Marketing Plan to Oaks Dropbox</p>
<p><b>Session 8</b> Monday, March 11</p>	<p><b>Topics:</b></p> <ul style="list-style-type: none"> <li>• Mid-Term Examination results</li> <li>• Mature &amp; Declining Markets</li> <li>• Simulation Q4 results</li> </ul>	<p><b>Reading:</b></p> <ul style="list-style-type: none"> <li>• Walker/Mullins, Chapter 10</li> <li>• WSJ: Kraft Heinz Writes Down \$1.2 Billion</li> <li>• Professor's slides (<i>posted to Oaks 1 week prior to class</i>)</li> </ul>
<p><b>Learning Objectives:</b></p> <ul style="list-style-type: none"> <li>• Discuss results from Mid-Term Examination</li> <li>• Understand typical business objectives, environmental considerations and marketing tactics used in mature and declining markets.</li> </ul>		<p><b>Assignments:</b></p> <p><u>Before Thurs, Mar 12 (400pm):</u></p> <ul style="list-style-type: none"> <li>• Complete Simulation Q5 decisions</li> <li>• Submit Marketing Plan to Dropbox (see Syllabus page 4 for further guidance)</li> </ul>



**Course Schedule – Sessions # 9 – 11**  
*All Class Sessions held in Tate Center #315, 4:00-6:45pm*

<p><b>Session 9</b> Monday, March 23</p>	<p><b>Topics:</b></p> <ul style="list-style-type: none"> <li>Digital Disruption</li> <li>Simulation Q5 results &amp; Marketing Plan feedback</li> </ul>	<p><b>Reading:</b></p> <ul style="list-style-type: none"> <li>Walker/Mullins, Chapter 11</li> <li>Quelch, “Hunley, Inc.” case</li> <li>Professor’s slides <i>(posted to Oaks 1 week prior to class)</i></li> </ul>
<p><b>Learning Objectives:</b></p> <ul style="list-style-type: none"> <li>Discuss Simulation Q5 results and feedback on Marketing Plans</li> <li>Understand how technology developments (especially digital) can disrupt established customer needs/behavior and business models. Discuss the role of innovation in business management.</li> </ul>		<p><b>Assignments:</b></p> <p><u>Before Thursday, Mar 26 (400pm):</u></p> <ul style="list-style-type: none"> <li><u>Case Report:</u> “Assess the Titaluk and Walmart opportunities strategically &amp; financially. What should CW3 do?” <ul style="list-style-type: none"> <li>Due to Dropbox. See page 3 for further guidance on paper format</li> </ul> </li> <li>Complete Simulation Q6 decisions</li> </ul>
<p><b>Session 10</b> Monday, March 30</p>	<p><b>Topics:</b></p> <ul style="list-style-type: none"> <li>Hunley case discussion</li> <li>Pricing Strategies &amp; Tactics</li> <li>Portfolio Design &amp; Management</li> <li>Simulation Q6 results</li> </ul>	<p><b>Reading:</b></p> <ul style="list-style-type: none"> <li>Michel, “Capture More Value”</li> <li>Avery, “Brand Portfolio Strategy &amp; Brand Architecture”</li> <li>Professor’s slides <i>(posted to Oaks 1 week prior to class)</i></li> </ul>
<p><b>Learning Objectives:</b></p> <ul style="list-style-type: none"> <li>Discuss learning from the Hunley case report.</li> <li>Review different pricing strategies and tactics that can be used in various lifecycle &amp; environment conditions</li> <li>Review strategic portfolio management techniques.</li> <li>Review Simulation Q6 results</li> </ul>		<p><b>Assignments:</b></p> <p><u>Before Thurs, Apr 2 (400pm):</u> Complete Simulation Q7 decisions</p>
<p><b>Session 11</b> Monday, April 6</p>	<p><b>Topics:</b></p> <ul style="list-style-type: none"> <li>Marketing Ethics</li> <li>Simulation Q7 results</li> </ul>	<p><b>Reading:</b></p> <ul style="list-style-type: none"> <li>Bailey, “Creating an Ethically Strong Organization”</li> <li>Quelch, “Whiskey and Cheddar” case</li> <li>WSJ: Facebook Settlement Vindicates Consumer Privacy</li> <li>WSJ: Juul’s Marketing Practices Under Investigation</li> <li>Professor’s slides <i>(posted to Oaks 1 week prior to class)</i></li> </ul>
<p><b>Learning Objectives:</b></p> <ul style="list-style-type: none"> <li>Review the key facets of Marketing Ethics, including key personal and corporate principles and risks</li> <li>Discuss Simulation Q7 results and outline Hand-Off Memo components</li> </ul>		<p><b>Assignments:</b></p> <p><u>Case Report:</u> “Should Caesan launch the Jameson branded product or one using generic whiskey?” <i>(Please address from a strategic and financial standpoint)</i></p> <ul style="list-style-type: none"> <li>Due to Dropbox before class start (400pm, Apr 6)</li> <li>See page 3 for further guidance on paper format</li> </ul> <p><u>Before Thurs, Apr 9 (400pm):</u> Complete Simulation Q8 decisions</p>

**Course Schedule – Sessions # 12 – 13**  
*All Class Sessions held in Tate Center #315, 4:00-6:45pm*

<p><b>Session 12</b> Monday, April 15</p>	<p><b>Topics:</b></p> <ul style="list-style-type: none"> <li>• Simulation Q8 results (&amp; awards!)</li> <li>• Implementing &amp; Controlling Marketing Plans</li> </ul>	<p><b>Reading:</b></p> <ul style="list-style-type: none"> <li>• Walker/Mullins, Chapters 12 &amp; 13</li> <li>• WSJ: Behind the Turnaround at Children’s Place</li> <li>• Professor’s slides <i>(posted to Oaks 1 week prior to class)</i></li> </ul>
<p><b>Learning Objectives:</b></p> <ul style="list-style-type: none"> <li>• Review Simulation performance results. Discuss learning from simulation.</li> <li>• Understand the importance of implementation planning, organizational alignment, program integration and effective performance management to initiative delivery</li> </ul>		<p><b>Assignments:</b></p> <p style="text-align: center;"><i>No assignment due for this class</i></p>
<p><b>Session 13</b> Monday, April 20</p>	<p><b>Topics:</b></p> <ul style="list-style-type: none"> <li>• Simulation Hand-off Presentations</li> <li>• Course summary &amp; wrap-up</li> </ul>	<p><b>Reading:</b></p> <p>No reading required for class session</p>
<p><b>Learning Objectives:</b></p> <ul style="list-style-type: none"> <li>• Demonstrate key learning from Simulation management and Plan formulation experience through presentation of Q9-12 Plan proposal to next management team</li> <li>• Assess understanding of entire course content through in-class examination.</li> </ul>		<p><b>Assignments:</b></p> <p>Hand-Off Memo &amp; Presentation</p> <ul style="list-style-type: none"> <li>– Due to Dropbox before class start (400pm, April 20)</li> <li>– See Syllabus page 4 for further guidance on questions. Formats to be shared during Session 11.</li> </ul>

## Reading List

### Textbook:

- Walker, Orville C. and John W. Mullins. "Marketing Strategy: A Decision-Focused Approach, 8<sup>th</sup> edition". McGraw-Hill Irwin, 2014.

Link: [https://www.academia.edu/16221233/Marketing\\_Strategy\\_A\\_Decision-Focused\\_Approach\\_Eight\\_Edition](https://www.academia.edu/16221233/Marketing_Strategy_A_Decision-Focused_Approach_Eight_Edition)

### Background Note:

- Boyle, Douglas S. "Note on Customer Analysis". (self-published, will be posted in Oaks Session 2 tab)

Harvard Cases & Articles: (available at: <https://hbsp.harvard.edu/import/675162> )

#### Cases:

- Nafees, Lubna, Neel Das, and Mokhalles Mehdi. "Lidl: A German Grocer in the United States". Ivey Publishing, March 6, 2019.
- Quelch, John and Alisa Zalosh. "Crescent Pure". Harvard Business School Publishing, September 10, 2014.
- Moore, Kate. "Saxonville Sausage Company". Harvard Business School Publishing, June 15, 2007.
- Quelch, John and James Kindley. "Hunley, Inc.: Casting for Growth". Harvard Business School Publishing, September 18, 2018.
- Quelch, John and Katherine Hartman. "Whiskey and Cheddar: Ingredient Branding at the Caesan Cheese Cooperative". Harvard Business School Publishing, May 20, 2019.

#### Articles/Notes:

- Casadesus-Masanell, Ramon. "Core Curriculum: Introduction to Strategy". Harvard Business Publishing, September 4, 2014.
- Gupta, Sunil. "Core Curriculum: Segmentation & Targeting". Harvard Business Publishing, June 30, 2014.
- Steenburgh, Thomas and Jill Avery. "Marketing Analysis Toolkit: Market Size and Market Share Analysis". Harvard Business School, February 4, 2010.
- Steenburgh, Thomas and Jill Avery. "Marketing Analysis Toolkit: Pricing and Profitability Analysis". Harvard Business School, December 2, 2011.
- Dolan, Robert J. "Low-Tech Marketing Math". Harvard Business School, December 17, 1998.
- President and Fellows of Harvard College. "Note on Financial Forecasting". Harvard Business School, April 18, 1983.
- Gourville, John. "Four Products: Predicting Diffusion (2018)". August 24, 2018.
- Michel, Stefan. "Capture More Value". Harvard Business Review, October 2014.
- Avery, Jill. "Brand Portfolio Strategy and Brand Architecture". Harvard Business School, July 31, 2017.
- Bailey, Catherine and Amanda Shantz. "Creating an Ethically Strong Organization". MIT Sloan Management Review, June 30, 2018.

#### News Articles

- WSJ: Shampoo Giants Go Head-to-Head. Oct 17, 2019. <https://www.wsj.com/articles/unilever-cuts-prices-as-shampoo-rivalry-grows-11571302051?mod=searchresults&page=1&pos=1>

- Ad Age: “Kind Eliminates 90 Field Marketing and Field Sales Jobs, or About 15 Percent of Full-Time Staff”: <https://adage.com/article/cmo-strategy/kind-eliminates-90-field-marketing-and-field-sales-jobs-or-about-15-percent-full-time-staff/2210651>
- WSJ: “Kraft Heinz Writes Down \$1.2 Billion as Brands Wither”, August 8, 2019. <https://www.wsj.com/articles/kraft-heinz-books-1-22-billion-in-impairment-charges-11565267075?mod=searchresults&page=1&pos=4>
- McKinsey on YouTube: “Navigating Digital Disruption”, May, 23, 2016. <https://www.youtube.com/watch?v=CtWZnr3AuWY>
- WSJ: Facebook Settlement Vindicates Consumer Privacy. July 24, 2019. <https://www.wsj.com/articles/facebook-settlement-vindicates-consumer-privacy-11564008019?mod=searchresults&page=1&pos=2>
- WSJ: Juul’s Marketing Practices Under Investigation by FTC. August 29, 2019. <https://www.wsj.com/articles/juuls-marketing-practices-under-investigation-by-ftc-11567096073?mod=searchresults&page=1&pos=3>
- WSJ: Behind the Turnaround at Children’s Place. May 13, 2019. <https://www.wsj.com/articles/behind-the-turnaround-at-childrens-place-11557766773?mod=searchresults&page=1&pos=1>