



Course Code: **BUSI4208A**

Winter 2026

Instructor	Lindsay McShane
Email Address	Lindsay.mcshane@carleton.ca
Class Times	Tuesdays (11:35am-2:25pm EST)
Modality	In-person
Office Hours	By appointment
Office Location	5055 Nicol Building
TA Name/Email	TBD

Pre-Requisites & Preclusions:

Prerequisite(s): third year standing, BUSI 2208, and one of BUSI 3205 or BUSI 3207 (with a grade of C or higher in each).

Course Description/Instructor's Statement

Course Calendar Description

In depth analysis and applications of the managerial aspects of marketing. Marketing strategy development and implementation theory and practice.

Course Perspective

BUSI 4208 is a senior course that assumes a basic foundational knowledge of marketing. It is designed to equip you with (a) insight into the strategic role of marketing as a tool for building sustainable competitive advantage for the organization, (b) tools for assessing the pros and cons of alternative marketing strategies, and (c) experience developing sensible and actionable marketing strategies. To achieve these objectives, we will use a combination of readings, lectures, and case discussions. The former two will provide the conceptual foundations for the course, exposing you to advanced marketing concepts that are helpful in developing effective marketing strategies. The case discussions will build on these concepts, giving you an opportunity to apply them to real-life marketing problems.

Most weeks, we will begin the day's session with an interactive lecture covering key concepts and issues relevant to that day's topic. This will be followed by a discussion of the case, during which you and your classmates will be expected to identify the key issues facing the organization and recommend a specific course of action to address them.

Course Objectives & Learning Outcomes:

1. To give you a strategic perspective on the role of marketing. You should leave this course with a solid understanding of how and why strategic marketing planning helps organizations deliver superior value to customers and superior returns to stakeholders.

2. To hone your marketing decision-making skills. You should leave this course with an ability to analyze an organization's environment, develop a viable set of marketing strategies, select the most appropriate one for the situation at hand, and convert it into an implementable and profitable action plan.
3. To deepen your understanding of marketing concepts, and how and when to apply them. You should leave this course with a clear understanding of concepts that are critical to the practice of marketing (e.g., segmentation, positioning, targeting). You should also be able to leverage this understanding to solve real-life business problems.
4. To enable you to integrate global and social/ethical dimensions into your marketing decisions. You should leave this course with an ability to evaluate the implications of your marketing decisions with regard to the global economy and the larger society in which the firm and its customers are embedded.

Required Materials

This course will use a combination of articles and cases to cover the material.

Articles: The articles will be made available at no cost through the Ares link on the course website.

Cases: The cases that will be used this term have been compiled in a coursepack available to purchase through the Harvard Business Impact Education website for 38.15 USD. A link to the course 'Casepack' will be posted on the course Brightspace at the beginning of the term.

Laptop: Students will need a laptop in class for in-class activities, as well as for the digital, in-person midterm.

e-Proctoring requirements: The midterm will be e-proctored by CoMaS+. The minimum computing requirements for e-proctoring service are as follows:

- Hardware: Laptop
- OS: Windows 10, Mac OS 10.14, Linux Ubuntu 18.04
- Internet Browser: Google Chrome, Mozilla Firefox, Apple Safari, or Microsoft Edge

Note: Chromebooks, tablets (Android, iOS, Windows), and smartphones are not supported by CoMaS at this time. You must complete your exams using Windows-based or MacOS computers.

Grading Scheme

Midterm (Individual)	25%
Case Snapshots (2 x 7.5% each) (individual)	15%
Consulting Project Written Report (group)	25%
Consulting Project Presentation (half individual; half group)	20%
Contribution to Class Discussion (individual)	15%
TOTAL	100%

*Each component of your grade will be assigned a percentage score. Your final course grade will be a weighted average of each of these components.

**There is no final exam in this course; all work will be completed during the academic term. The requirement for satisfactory in-term performance is an average of 50%, based on the above components weighted according to the scheme indicated

***Written assignments should be submitted electronically via Brightspace.

More Details about Course Deliverables:

- 1. Case Snapshots (15%):** We will discuss seven cases in class throughout the term. To help you prepare for the in-class case discussions throughout the term and for the midterm, you will write a snapshot for the cases discussed in Week 3 and Week 6. Each case snapshot will be due at the beginning of class that week (prior to the in-class case discussion) and each will be valued at 7.5% of your final grade. The guideline will be made available on Brightspace.

Late submissions of case snapshots will not be accepted given that we will be discussing the assignment in class on the due date. Please discuss any extenuating circumstances with the professor.

- 2. Midterm (25%):** In Week 7, students will complete an in-class midterm. Details of the midterm format will be discussed in class prior to the assessment.

* Please note that, in the event that you are unable to write a midterm, test, or other scheduled assessments due to extenuating circumstances (such as a death in the family, illness, etc.), you must provide appropriate supporting documentation to your professor. Upon review, a deferred test may be offered. Please note that students who do not provide valid documentation or fail to offer a reasonable explanation for missing an assessment will receive a grade of 0% for that test. **The deferral will be held on Monday, March 16 at 7:15am.**

- 3. Consulting Project (25% written project, 20% presentation – 10% group, 10% individual):** This project will give you the opportunity to apply your marketing management knowledge and skills to a live, real-world situation. Working in a group, you will identify a client organization facing a marketing problem/opportunity that is of interest to you and summarize your proposed project in 500 words or less. (NOTE: You are encouraged to work with a client but may choose to work with a company or rely solely on publicly-available sources for your information; in either case, both the client and the problem / opportunity must be explicitly approved by me.) Once approved, you will prepare a 3,000-4,000 word consultant's report summarizing your assessment of the situation, identifying viable alternatives, and proposing a specific course of action. Further details will be provided later in the term. Our last 2 classes will be devoted to presentation of these real-world cases.

With regards to the oral presentations, the 20% grade is divided into two components – 10% will reflect a group grade assessing the quality of the presentation content and delivery, and the remaining 10% will be an individual grade assessment of the quality of your presentation across all components (e.g., when presenting, when other team members are presenting, during the Q&A)

From time to time, conflicts and disputes may arise within a group. I encourage you to resolve these disputes internally and in a professional manner. If, however, this is not possible, please do not hesitate to inform me of the problems. I will do whatever I can to assist you. Please do this as soon as possible because if you wait until the end of the semester to inform me of a problem, there is little I can do to solve it.

Please note the following:

- At the end of the semester, you are required to complete a Peer Evaluation Form where you will evaluate the effort of your team members. Poor peer evaluations will result in reduced grades on group assignments. Thus, your final grade for all group assignments will be based on two things: (1) the quality of the assignment and (2) peer evaluation.
- Every part of the written group project must be labelled with the name of the person(s) who wrote that section. It is essential that you include the author(s)' names in the headings of each section and sub-section so that this will be included in the table of contents as well. This does not preclude the expectation that the document read as a single report that flows well as stated above.
- Assignments submitted past the due date will receive a penalty of 5% per day. Assignments that are not submitted after 7 days past the due date will receive a grade of 0. Exceptions to this include verifiable illness and emergencies, only when communicated directly to me within three (3) business day following the due date.

4. Class Participation (15%): The evaluation of your class contribution will base on the quality of your in-class contribution over the course of the term (both lecture and case discussions). Please note, that while you need to participate to contribute, the emphasis will be on the quality of your participation rather than quantity or frequency. The quality of your course experience will be directly related to the quality of the in-class contributions so please come to class having read all articles and cases, and ready to share your thoughts and ideas. Coming to class alone will earn no class contribution marks as it is not an attendance mark. Please see note below on case discussions for more detail on in-class contribution.

A Note About Case Discussions

A satisfying case discussion experience requires rigorous preparation prior to class, and commitment to high-quality in-class discussion. There is a difference between contributing and merely participating. The latter can be achieved by saying just about anything (such as quoting a number from the case). *Meaningful* contribution requires that you teach your peers something useful that might otherwise have gone unnoticed. Here are a few examples:

- starting off the discussion in a thought-provoking way
- offering constructive criticism of another's ideas
- redirecting the discussion in a useful direction when it stagnates
- summarizing effectively
- emphasizing generalizable learning points
- sharing calculations
- pursuing the logic advanced by others, not letting it die prematurely
- presenting rigorous, but not stubborn, defense of a well-articulated position.

Policies & Accommodations

<https://students.carleton.ca/course-outline/>
<https://carleton.ca/pmc/current-students/academic-accommodations/>



Stay updated with important notifications and announcements from Carleton University, by downloading the Carleton University App!

E-mail Policy

In keeping with Carleton University policy, your @cmail accounts must be used for any enquiries which involve confidential student information (e.g., regarding grades or health issues). I do not promise to respond to student emails over the weekend. During the week I will do my best to answer your e-mails within 48 hours. Please note that I will not provide e-mail answers to questions that have already been asked and answered in class.

Other Expectations

Use of Technology: The use of mobile phones in class is disruptive to learning and is prohibited. If you carry a phone to class, please make sure it is turned off. If an emergency situation requires you to keep your cell phone turned on, please discuss this with me prior to that day's class. Use of laptop computers in class is permitted for activities related to our course. Please do not use your laptop for any other purposes (e.g., surfing, e-mailing, etc.) which can be distracting to you and those around you. Inappropriate use of your laptop in class will be noted and will negatively affect your participation grade.

Use of Generative Artificial Intelligence: AI use in this course varies by assignment. Some activities will explicitly invite you to use AI tools; others will require work completed independently. These parameters will be discussed in greater detail in class with assignments are discussed. In all cases, when AI is used, be transparent about how you used it and apply critical judgment to verify its accuracy and relevance.

CLASS SCHEDULE

Week	Date	Topics	Class Preparation	Due This Week
	Jan. 6	<u>No Class</u>		
1	Jan. 13	Course Introduction A) Understanding Marketing Management and Analyzing Marketing Problems and Cases B) Strategic Role of Marketing	<u>Readings</u> Marketing Myopia. (Levitt 1960) When Marketing is Strategy (Dawar 2013)	
2	Jan. 20	Understanding Consumers	<u>Readings</u> Competing on Customer Journeys (Edelman and Singer 2015) The New Science of Customer Emotions (Magids et al., 2015) CASE: see Brightspace	Due: Groups and Member Names
3	Jan. 27	Market Segmentation, Target Selection, and Positioning	<u>Readings</u> Rediscovering Market Segmentation (Yankelovich & Meer 2006) Make Your Best Customers Even Better (Yoon et al. 2016) CASE: see Brightspace	Due (before class): Case Snapshot #1
4	Feb. 3	Marketing Research, Understanding Customers and Financial Analysis for Marketing	<u>Readings</u> Quantitative Analysis (see Coursepack for this reading) CASE: see Brightspace	Due: Group Study Company and Proposal
5	Feb. 10	Library Research Session and Marketing Research continued	ESRI BUSINESS ANALYST and GROUP PROJECT	

	Feb. 17	Reading Week - No Classes		
6	Feb. 24	Brand Equity and Brand Management	<u>Readings</u> What Does Your Corporate Brand Stand For (Greyser and Urde 2019) Branding in the Age of Social Media (Holt, 2016) CASE: see Brightspace	Due (before class): Case Snapshot #2
7	Mar. 3	MIDTERM (digital, in-person with CoMaS e-proctoring)		
8	Mar. 10	Product Strategy	<u>Readings</u> Know your Customers' Jobs to be Done (Christensen et al., 2016) The Elements of Value (Almquist, Senior & Bloch, 2016) Optional: The Goldilocks Theory of Product Success (Berger 2016) CASE: see Brightspace	
9	Mar. 17	Pricing Strategy	<u>Readings</u> How Do You Know When the Price Is Right? (Dolan 1995) The Good-Better-Best Pricing Strategy (Mohammed, 2018) CASE: see Brightspace	

10	Mar. 24	Marketing Communications	<u>Readings</u> How to Make the Most of Omnichannel Retailing (Zeng et al. 2016) The Ultimate Marketing Machine (Arons et al. 2022, originally published 2014) CASE: see Brightspace	
11	March 31		Presentations	
12	Apr. 7		Presentations	Due Before Class: <i>Consulting Reports (along with Declaration of Academic Integrity and AI log)</i> Due at 11:59 pm: <i>Peer Evaluations</i>

*While every effort will be made to keep to the schedule listed above, unforeseen circumstances and availability of guest speaker(s) may necessitate modifications to this schedule during the semester. I will keep you informed of any changes via Brightspace and/or in class.

**Please note that additional cases/articles may be added to Brightspace throughout the term to support in-class sessions. All readings will be posted a minimum of 72 hours prior to class.

Refer to Academic Calendar for dates University Closed Dates and Holidays
<https://calendar.carleton.ca/academicyear/>

Contribution to Learning Goals of the Program (BCom, BIB):

Program Learning Goal	Competencies Not Covered	Competencies Introduced (only)	Competencies Taught But Not Assessed	Competencies Taught and Assessed
CHECK (X) ONE PER ROW				
BC1 Knowledge <i>Graduates will be skilled in applying foundational business knowledge to appropriate business contexts.</i>				X
BC2 Collaboration <i>Graduates will be collaborative and effective contributors in team environments that respect the experience, expertise and interest of all members.</i>				X
BC3 Critical Thinking <i>Graduates will be discerning critical thinkers, able to discuss different viewpoints, challenge biases and assumptions, and draw conclusions based on analysis and evaluation.</i>				X
BC4 Communication <i>Graduates will be effective and</i>				X

<i>persuasive in their communications.</i>				
BI5 Global Awareness (BIB ONLY) <i>Graduates will be globally-minded.</i>	X			

ADDITIONAL INFORMATION

Course Sharing Websites

Materials created for this course (including presentations and posted notes, labs, case studies, assignments, and exams) remain the intellectual property of the author(s). They are intended for personal use and may not be reproduced or redistributed without prior written consent of the author(s).

Required calculator in BUSI course examinations.

If you are purchasing a calculator, we recommend anyone of the following options: Texas Instruments BA II Plus (including Pro Model), Hewlett Packard HP 12C (including Platinum model), Staples Financial Calculator, Sharp EL-738C & Hewlett Packard HP 10bII

Group work

The Sprott School of Business encourages group assignments in the school for several reasons. They provide you with opportunities to develop and enhance interpersonal, communication, leadership, followership, and other group skills. Group assignments are also good for learning integrative skills for putting together a complex task. Your professor may assign one or more group tasks/assignments/projects in this course. Before embarking on a specific problem as a group, it is your responsibility to ensure that the problem is meant to be a group assignment and not an individual one.

Grading

In accordance with the Carleton University Undergraduate Calendar (p 34), the letter grades assigned in this course will have the following percentage equivalents:

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

Grades entered by Registrar:

WDN = Withdrawn from the course

DEF = Deferred

Academic Regulations

University rules regarding registration, withdrawal, appealing marks, and most anything else you might need to know can be found on the university's website, here:

<http://calendar.carleton.ca/undergrad/regulations/academicregulationsoftheuniversity/>

Requests for Academic Accommodation

Carleton is committed to providing academic accessibility for all individuals. You may need special arrangements to meet your academic obligations during the term. The accommodation request processes, including information about the *Academic Consideration Policy for Students*

in Medical and Other Extenuating Circumstances, are outlined on the Academic Accommodations website (students.carleton.ca/course-outline).

You may need special arrangements to meet your academic obligations during the term. For an accommodation request, the processes are as follows:

Pregnancy Accommodation

Please contact your instructor with any requests for academic accommodation during the first two weeks of class, or as soon as possible after the need for accommodation is known to exist. For more details, visit the Equity Services website: [Pregnancy Academic Accommodation Information - Equity and Inclusive Communities](#)

Religious obligation

Please contact your instructor with any requests for academic accommodation during the first two weeks of class, or as soon as possible after the need for accommodation is known to exist. For more details, visit the Equity Services website: [Academic Regulations for Students with Religious Obligations < Carleton University](#)

Academic Accommodations for Students with Disabilities

If you have a documented disability requiring academic accommodations in this course, please contact the Paul Menton Centre for Students with Disabilities (PMC) at 613-520-6608 or pmc@carleton.ca for a formal evaluation or contact your PMC coordinator to send your instructor your Letter of Accommodation at the beginning of the term. You must also contact the PMC no later than two weeks before the first in-class scheduled test or exam requiring accommodation (if applicable). After requesting accommodation from PMC, meet with your instructor as soon as possible to ensure accommodation arrangements are made. carleton.ca/pmc

Survivors of Sexual Violence

As a community, Carleton University is committed to maintaining a positive learning, working and living environment where sexual violence will not be tolerated, and its survivors are supported through academic accommodations as per Carleton's Sexual Violence Policy. For more information about the services available at the university and to obtain information about sexual violence and/or support, visit: [Sexual Violence Prevention & Survivor Support - Equity and Inclusive Communities](#)

Accommodation for Student Activities

Carleton University recognizes the substantial benefits, both to the individual student and for the university, that result from a student participating in activities beyond the classroom experience. Reasonable accommodation must be provided to students who compete or perform at the national or international level. Please contact your instructor with any requests for academic accommodation during the first two weeks of class, or as soon as possible after the need for accommodation is known to exist. <https://carleton.ca/senate/wp-content/uploads/Accommodation-for-Student-Activities-1.pdf>

For more information on academic accommodation, please contact the departmental administrator or visit: students.carleton.ca/course-outline

Academic Integrity

Violations of academic integrity are a serious academic offence. Violations of academic integrity – presenting another's ideas, arguments, words or images as your own, using unauthorized material, misrepresentation, fabricating or misrepresenting research data, unauthorized co-operation or collaboration or completing work for another student – weaken the quality of the degree and will not be tolerated.

Process: If an alleged violation occurs, all relevant documentation will be forwarded to the Dean. If the allegation proves true, the penalties may include; a grade of Failure on the submitted work and/or course; academic probation; a refusal of permission to continue or to register in a specific degree program; suspension from full-time studies; suspension from all studies at Carleton; expulsion from Carleton, amongst others. For a first offence, at a minimum, the penalty assigned will normally be a zero on the submitted work and at least a minimum full grade reduction of the final course grade. For a second offence, at a minimum, the penalty assigned will normally lead to a suspension from studies.

Students are expected to familiarize themselves with and follow the Carleton University Student Academic Integrity Policy which is available, along with resources for compliance at: <https://carleton.ca/registrar/academic-integrity/>.

Sprott Student Services

The Sprott Undergraduate Student Services Office offers program advising and overall student success support. Our team is available to discuss your academic goals and your program progression plans. We can also work with you to develop strategies for success, including study skills for Business. If you experience any difficulty this term or if you would like to access support, please contact our team at bcom@sprott.carleton.ca or at bib@sprott.carleton.ca.

Centre for Student Academic Support

The Centre for Student Academic Support (CSAS) is a centralized collection of learning support services designed to help students achieve their goals and improve their learning both inside and outside the classroom. CSAS offers academic assistance with course content, academic writing and skills development. Visit CSAS on the 4th floor of MacOdrum Library or online at: carleton.ca/csas.

Important Information:

- Students must always retain a copy of all work that is submitted.
- All final grades are subject to the Dean's approval.
- For us to respond to your emails, we need to see your full name, CU ID, and the email must be written from your valid CARLETON address. Therefore, in order to respond to your inquiries, please send all email from your Carleton CMail account. If you do not have or have yet to activate this account, you may wish to do so by visiting <https://carleton.ca/its/get-started/new-students-2/>
