



MKTG 5200A: Marketing Strategy

Winter 2026

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

Pre-Requisites & Preclusions:

N/A

Course Description/Instructor's Statement

Carleton Calendar Description (Find at <https://calendar.carleton.ca/grad/courses/>)

This course discusses essential concepts for cultivating and maintaining successful buyer-seller relationships, customer and competitor analysis, segmentation, targeting, and positioning. Translation of target market and positioning decisions into actionable marketing plans, including product, pricing, channel/promotional decisions, and tools for forecasting/evaluating success. Organizational capstone project required.

Instructor's Description:

Marketing is a set of processes for creating, communicating and delivering value to customers, and for managing customer relationships in ways that benefit the organization and its stakeholders. Although these processes are often coordinated by a 'marketing department', they are a product of the entire organization. Hence, a solid grasp of marketing is critical to your effectiveness as a manager regardless of your career path or role within the organization.

Marketing strategy is the means by which organizations choose which customers to serve and how to serve them. Its goal is to generate sources of sustainable competitive advantage that allow the organization to provide superior value to customers and superior returns to stakeholders. This requires sensible segmentation, targeting, and positioning, grounded in a solid understanding of customers, competitors and the organization's own strengths and weaknesses. It also demands effective implementation of these decisions: What products should be offered? How should they be priced relative to competitors and what pricing structure should be used? Should different versions of the product be offered to different groups of customers, and should some pay more than others? What is the best way to promote the offering and deliver it to customers? This course will provide you with tools to analyze markets, formulate sound marketing strategies, and translate that strategy into specific and actionable marketing mix decisions.

Course Learning Objectives:

1. To understand the role of marketing within the organization. You should leave this course with a solid grasp of the role of marketing and how and why strategic marketing planning helps organizations deliver superior value to customers and superior returns to stakeholders.
2. To know and be able to apply relevant marketing concepts. You should leave this course with a working understanding of concepts that are critical to marketing strategy.
3. To be comfortable with the process of making sound strategic marketing decisions. You should leave this course with the ability to analyze an organization's environment, develop a viable set of strategic marketing options, and select the most appropriate one for the given context.
4. To have a working knowledge of tactical marketing decisions. You should leave this course with a good understanding of decisions that need to be made regarding the marketing mix: i.e., product offering, pricing, distribution, and promotion.
5. To be capable of developing actionable marketing plans. You should leave this course with an ability to translate business problems into sensible marketing strategies and action plans.

Required/Optional Materials & Prices

This course will use a combination of textbook material and cases.

Textbook: Philip T. Kotler, Kevin Lane Keller and Alexander Chernev. Marketing Management, 17th edition. Published by Pearson (November 6, 2024) © 2026. Available on the following website at \$67.77 one-time e-book purchase. <https://www.pearson.com/en-ca/subject-catalog/p/marketing-management/P200000010451/9780138184889>

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 43.10 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

Written Case Analysis (individual)	15%
Midterm Exam (individual)	25%
Group Project Proposal (group)	5%
Group Project Written Report (group)	25%
Group Project Presentation (group and individual)	15%
Contribution to Class Discussion (individual)	15%
TOTAL	100%

Important Dates to Note

Groups Membership Due	January 19, 2025
Proposal Due (5%)	January 26, 2025
Individual Written Case Analysis (15%)	February 23, 2025
Midterm (25%)	March 9, 2025
Final Project Written Report (25%) (with related documents including the Declaration of Academic Integrity, AI log and Peer Evaluation)	April 6, 2025
Presentations	Specific date TBD (one of the last two class sessions)
Contribution to Class Discussion	Ongoing

University Academic Calendar: <https://calendar.carleton.ca/academicyear/>

Policies & Accommodations

<https://students.carleton.ca/course-outline/>

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



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Additional Information on Deliverables and Grading

*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. **Written Case Analysis (15%):** One of the cases discussed in class will also serve as a written assignment. Your task is to prepare a consultant's report for the company. The case analysis write-up is limited to 2,000 words (plus appendices); you will be tasked with sizing up the key problems / opportunities raised by the case, identifying and evaluating strategic alternatives, and proposing a specific course of action for the decision-maker.

Late submissions of the written case analysis 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 Exam (25%):** This is a digital, in-person midterm scheduled for the full session on March 2, 2025. 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 23 at 7:15am.**

3. **Group Project (45%):** Working in a group of three to four students, you will identify a client organization facing a marketing problem/opportunity (both the client and the problem/opportunity must be approved by the professor).

- a. **Proposal (5%):** Your team will identify a client organization facing a marketing problem/opportunity. You will then prepare a 1-2 page proposal that summarizes the problem/opportunity, identifies the main strategic options, and describes the process you will use to evaluate these alternatives and make recommendations. All projects must be approved by the professor before undertaking as the group project.

*Please note that it is the group's responsibility to ensure that there is sufficient information to complete all the required analyses for the capstone report. Particular attention should be given to ensuring the availability of market information, competitor information and/or industry data for various metrics (a sufficient number of publicly listed and comparable firms) to perform industry analyses. The entire firm should be analyzed as it relates to the marketing problem being examined (e.g., multinational firms should be avoided) and firms researched in other classes **are not eligible**. Students are reminded it is a violation of academic plagiarism policy to submit substantially the same analysis used for multiple courses.

- b. Written Report (25%):** Your group will then prepare a maximum 5,000-word consultant's report for the client summarizing your assessment of the situation, identifying viable alternatives, and proposing a specific course of action with respect to target market / positioning and product offering, pricing, distribution, and promotion. Please refer to the rubric on Brightspace for specific details.
- c. Presentation (15% - 7.5% group; 7.5% individual):** Presentations scheduled for the end of the semester (see course calendar). Depending on class size and the number of groups, adjustments may be made to the course calendar and presentation schedule as necessary. Further details on presentation dates and order will be discussed in class. Attendance during presentation weeks is mandatory for all students. All group members must participate in their team presentations.

Please note that the 15% grade for presentations 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. Contribution to Class Discussion (15%):** The professor will evaluate your overall contribution to the class discussion (both lecture and case discussions). You may be asked to present certain concepts to the class as well. Although you must participate to contribute, the emphasis will be on the quality of your participation rather than quantity or frequency

(see the note about case discussions for additional guidance). Your goal should be to make comments that facilitate the learning of your peers.

Preparation and Participation

A satisfying case discussion experience requires rigorous preparation prior to class. To that end, you are responsible for reading and analyzing the assigned case prior to each class. This advance preparation will enhance your learning experience by allowing you to digest issues more fully before they are raised in the broader class discussion.

Regular contribution from all class members is essential for effective case discussion. Keep in mind that there is a difference between contributing to and merely participating. The latter can be achieved by saying just about anything (such as quoting a number or simple fact 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, and;
- presenting rigorous, but not stubborn, defense of a well-articulated position.

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.

Contribution to Program Learning Goals ([MBA](#)):

MBA Learning Goal	Not Covered	Introduced	Taught but Not Assessed	Taught <u>and</u> Assessed
MB1 Leadership and Collaboration <i>Graduates will be equipped for leadership and collaboration.</i>				✓
MB2 Communication <i>Graduates will be effective communicators</i>				✓
MB3 Critical Thinking and Problem Solving <i>Graduates will be skilled in critical thinking and problem solving.</i>				✓
MB4 Functional Knowledge <i>Graduates will have functional knowledge of all areas of business.</i>				✓
MB5 Global Business <i>Graduates will have an appreciation of the global environment of business.</i>			✓	
MB6 Ethical Reasoning <i>Graduates will be skilled in ethical reasoning and decision-making.</i>		✓		

COURSE SCHEDULE

Week	Date	Topics	Class Preparation	Due This Week
	Jan. 5	No class		
1	Jan 12	Course Introduction A) Understanding Marketing Management and Analyzing Marketing Problems and Cases B) Strategic Role of Marketing	Chapters 1 and 2 Course Outline	
2	Jan 19	Understanding Consumers	Chapters 3 and 19 Assigned Case: see Brightspace	Due by end of class: Group Membership
3	Jan 26	Market Segmentation, Target Selection and Positioning	Chapters 6 and 7 Assigned Case: see Brightspace	Due by 11:59pm: Group Study Company and Proposal
4	Feb 2	Marketing Research and Financial Analysis for Marketing	Quantitative Analysis article (see coursepack) Assigned Case: see Brightspace	
5	Feb 9	Library Research Session and Marketing Research continued	Chapter 5	
	Feb 16	Reading Week		
6	Feb 23	Brand Equity and Brand Management	Chapter 10 Assigned Case: see Brightspace	Due (before class): Individual Written Case Analysis
7	Mar 2	Product Strategy	Chapter 8 and 9 Assigned Case: see Brightspace	
8	Mar 9	Midterm (full in-class session)		
9	Mar 16	Communicating Value	Chapter 12 and 13 Assigned Case: see Brightspace	
10	Mar 23	Pricing Strategy and Delivering Value	Chapter 11, 15 and 16 Assigned Cases: see Brightspace	
11	Mar 30	Presentations (Attendance Mandatory)		
12	April 6	Presentations (Attendance Mandatory)		Due (before class): Final Group Written Report (along with Declaration of Academic Integrity and AI log) Due by 11:59pm: Peer Evaluation Form

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).

Recommended Calculator for Examinations:

If you are purchasing a calculator, we recommend any one 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. They provide you with opportunities to develop and enhance interpersonal, communication, leadership, followership and other group skills. Group assignments are also an effective way to learn integrative skills for putting together a complex task. Your professor may assign one or more group tasks, assignments, or 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.

Peer Evaluation for Group Work

To deter social loafing and ensure fairness in grading, you will be asked to assess the contribution of your fellow group members. This information will be used when assigning the grade for the final project. The procedure is as follows: Each student will be required to assess their own and each group member's contribution to both the report and the presentation on a scale of 1-10. To ensure that these peer evaluation scores are reasonable and free from personal bias, you will be asked to provide a detailed written explanation for your point allocation.

Letter Grades:

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	F = Below 50
A = 85-89	B = 73-76	C = 63-66	D = 53-56	
A - = 80-84	B - = 70-72	C - = 60-62	D - = 50-52	

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:

<https://calendar.carleton.ca/grad/gradregulations/>

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**

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 Obligations**

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](#)

- **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. <https://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](#)

- **Student Activities**

Carleton University recognizes the substantial benefits, to both the individual student and the university, that result from participating in activities beyond the classroom experience.

Reasonable accommodation will 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: <https://students.carleton.ca/course-outline/>

Academic Integrity:

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—are a serious academic offence, weaken the quality of the degree, and will not be tolerated. 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. 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/>

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: <https://carleton.ca/csas/>

Other 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 can do so by visiting <https://carleton.ca/its/get-started/new-students-2/>