

BUSI 4201 A: Marketing Metrics

Fall 2026

Instructor	Hadis Mohammadzadeh
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Class Times	Monday, 8:35 AM – 11:25 AM
Modality	In-person
Office Hours	By appointment
TA Name/Email	To be determined

Pre-Requisites & Preclusions:

Prerequisites: [BUSI 2018](#) (or [BUSI 1005](#)) and [BUSI 2208](#).

Course Description/Instructor's Statement

Carleton Calendar Description

An overview of essential marketing metrics used for enhancing marketing decisions. The course consists of seven core modules: share metrics, margins and profits, pricing, product and portfolio management, sales force management, promotion profitability, and customer profitability.

Instructor's Course Description:

This course takes an applied and data-driven approach to understanding how firms make decisions about marketing investments. Students learn how to use metric-driven tools and techniques to enhance marketing decisions. The course consists of seven core modules: share metrics, margins and profits, pricing, product and portfolio management, sales force management, promotion profitability, and customer profitability.

Course Learning Objectives:

The key learning objective is to provide students with an overview of tools and techniques that can be used to quantify the strategic value of marketing initiatives.

The course is designed to help students to:

- 1) develop expertise in using numerical information to justify and evaluate marketing strategies
- 2) be able to correctly select, calculate, and interpret specific marketing metrics for marketing decisions and articulate returns on marketing investment
- 3) understand the connections across various marketing metrics

Required/Optional Materials & Prices

Farris, P.W., Bendle, N.T., Pfeifer, P.E., and Reibstein, D.J. (2021) Marketing Metrics: The Manager's Guide to Measuring Marketing Performance (Fourth edition). Pearson Education, Inc. Text ISBN-13: 978-0-13-671713-3; eText ISBN-10: 0-13-671713-6. **Students are not required to purchase textbooks or other learning materials for this course.**

Textbook (s) available at the Campus Store in Nideyinàn or order online for pick up:
<https://carletonshop.ca/Course/term>

Grading Scheme

Quizzes (Quiz #1: 3%; Quiz #2: 4%; Quiz #3: 3%)	10%
Test 1	40%
Test 2	25%
Test 3	15%
Marketing Metrics Certification	10%
TOTAL	100%

Policies & Accommodations

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

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



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Preparation and Participation:

1. Quizzes and Tests

All quizzes and tests are closed book and closed note. Students might be required to bring a laptop to write quizzes and tests in class. The assessments should be completed by your own efforts and should not collaborate with any other person for ideas or answers. Violations of academic integrity 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.

2. Marketing Metrics Certification

To qualify for the certification exam held by Management by the Numbers (MBTN) organization, students must register for an MBTN account with a fee. If a student does not pass the certificate exam (i.e., a score lower than 80 out of 100), she/he may take it again every 7 days until the deadline of Dec 11, 11:59pm, EST. Students who pass the exam will receive 10% of the final grade. Students who fail the exam will have their exam score counted toward their final grade. For example, a student with an exam score of 70 will receive 7% of the final grade.

Course Schedule

		Content	Note
1	Sept 14	Course Administration Overview An Introduction to Marketing Metrics	
2	Sept 21	Module A: Share Metrics (Part 1)	
3	Sept 28	Module A: Share Metrics (Part 2)	
4	Oct 05	Module B: Margins and Profits (Part 1)	
		Quiz #1 on Module A	In person Duration: around 20 minutes
5	Oct 12	Thanksgiving (No classes)	
6	Oct 19	Module B: Margins and Profits (Part 2) Module C: Pricing (Part 1)	
7	Oct 26	Fall Break (No classes)	
8	Nov 02	Module C: Pricing (Part 2)	
		Quiz #2 on Modules B and C (Part 1)	In person Duration: around 20 minutes
9	Nov 09	Test #1 on Modules A, B, &C	In person
10	Nov 16	Module D: Product and Portfolio Management Module E: Sales Force Management	
11	Nov 23	Test #2 on Modules D&E	In person
12	Nov 30	Module F: Promotion Profitability	
13	Dec 07	Module G: Customer Profitability	

		Quiz #3 on Module F	In person Duration: around 20 minutes
14	Dec 11	Test #3 on Module F&G	In person (Friday at the same time and the same location)
		Dec 11	Deadline for last attempt at MBTN "Profit Impact Metrics" certificate exam: Dec 11, 11:59pm, EST

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

Module Contents

Module A Share Metrics	Module B Margins and Profits	Module C Pricing	Module D Product and Portfolio Management
market share	Variable and Fixed costs	Price minimum	trial volume and trial rate
relative market share	Margins	maximum reservation price and maximum willingness to buy	repeat volume and repeat rate
market concentration	Markups	price elasticity	adjusted trial rate
market penetration	Channel Margins	optimal price	product introduction forecasted volume
brand penetration	Average price per unit	% breakeven price change	cannibalization rate
penetration share	Contribution per unit	price discrimination / segmented pricing	weighted contribution margin
share of requirements	Contribution Margin	competitor reaction elasticity, and cross and residual price elasticity	breakeven with cannibalization
heavy usage index	Breakeven sales		
market share decomposition	Target profit		
brand development index	Rate of return on sales		
category development index	Breakeven on incremental investment		

Module F Sales force management	Module E Promotion Profitability	Module G Customer Profitability
Sales funnel	Baseline sales	Share of voice
Sales pipeline	Incremental sales	Page views visits
Lead	Promotion lift	Visitors
Closure rate	Return on marketing investment	Click through rates
Sales forecasting workload	Coupon redemption	Cost per click
Sales force effectiveness	Pass-through	Cost per order
	Gross rating points impression	Cost per customer acquired
	Cost per thousand impressions reach	Bounce rate
	Frequency	Abandonment rate
		Customer lifetime value
		Retention rate
		Attrition rate
		Churn rate

e-Proctoring

If e-Proctoring is implemented for digital exams, please note that tests and examinations in this course will use a mandatory remote proctoring service provided by Scheduling and Examination Services. You can find more information at <https://carleton.ca/ses/e-proctoring/>.

Students are responsible for ensuring that the application is working properly on your computer during the exam. Failure to ensure proper functioning of CoMaS will constitute a violation of the exam rules and may be grounds for an allegation that you have violated the Academic Integrity Policy.

The minimum computing requirements for this service are as follows:

Hardware: Desktop, or Laptop

OS: Windows 10 or higher, Mac OS 10.14 or higher

Internet Browser: Google Chrome, Mozilla Firefox, Apple Safari, or Microsoft Edge

Internet Connection (High-Speed Internet Connection Recommended)

Webcam (HD resolution recommended)

Note: Tablets, Chromebooks, Smartphones and Windows-based tablets are not supported at this time.

Deferred In-Class Tests:

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 test 1 will be held on Monday, *November 16th* at 7:15am.

The deferral test 2 will be held on Monday, *November 30th* at 7:15am.

Deferred final exams:

If you wish to defer a **Formal Final Exam**, you – the student – must reach out to the registrar's office with the proper documentation prior to the deadline (please refer to <https://carleton.ca/registrar/deferral/> for dates). Once the request has been put through, your instructor will be notified for their approval.

Use of Generative Artificial Intelligence

This is a human-centered course. In this course, evaluation focuses on what you can do *without* AI assistance. While you are welcome to use AI tools to explore ideas, study, or clarify concepts, all submitted work must represent your independent thinking and original effort. Use AI for learning, not for producing graded submissions. Your understanding and reasoning—not AI output—will form the basis of assessment. Using AI for graded submissions constitutes an academic integrity violation.

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).

Recommended Calculator for 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).

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, please review the [pregnancy academic accommodation process](#).

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, please review the [religious academic accommodation process](#).

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. For more details, visit the [Paul Menton Centre website](#).

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 where 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 the [Equity and Inclusive Communities website](#).

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. For more details, see the [Senate Policy on Accommodation for Student Activities \(PDF, 25 KB\)](#).

Academic Consideration for Medical and Other Extenuating Circumstances

Due to medical and other extenuating circumstances, students may occasionally be unable to fulfil the academic requirements of their course(s) in a timely manner. The university supports the academic development of students and aims to provide a fair environment for students to succeed academically. Medical and/or other extenuating circumstances are circumstances that are beyond a student's control, have a significant impact on the student's capacity to meet their academic obligations, and could not have reasonably been prevented. Students may request Academic Consideration for Coursework or Other Academic Deliverable. For further information please review the [Procedure for Academic Consideration](#) and the [FAQ page](#).

Scheduling and Examination Support

Scheduling and Examination Services provides various supports for both in-term and end-of-term tests and exams. Details can be found on the [Exam Support website](#).

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 academicadvising@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/>
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