



BUSI 4208 A
Marketing Management
Winter 2018

Instructor: Dennis Sakalauskas, M.Sc.
Office: Dunton Tower #919 – 2
Office Hours: By appointment (via email)
Email: dennis.sakalauskas@carleton.ca

Course meets: St. Patrick's Building #435; Fridays 2:35 pm – 5:25 am

Pre-requisites & precluded Courses: BUSI 2208 and one of BUSI 3205 or BUSI 3207 with a grade of C or higher in each.

Course Calendar description from the 2017/2018 University calendar:

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

Extended Course Description:

This course prepares students to practically apply marketing strategy leveraging the most modern technologies, including online and digital marketing. Moreover, this course will prepare students to perform as a Chief Marketing Officer (CMO) and strategically manage customer relationships via generating critical brand awareness to acquire a new customer base, while also retaining customers, among many other necessary marketing and business development components.

Customers in all sense of the word truly define and also make or break a business or organization. Managing customers and the respective business relationships of those customers therefore, is not only important, but also mandatory for businesses to grow, thrive and to be sustainable over time. Marketing, but also digital marketing and modern sales techniques have become an integral part of both small, entrepreneurial start-up businesses and major multi-national corporations. The adoption of marketing, brand awareness and customer relationship management (CRM) systems represents a transformation of the firm from *product-centric* to a more *customer-centric focus*. The objective of businesses is no longer to just acquire customers and compete with companies to encourage customers to switch, but also the objective is one of acquisition followed by development and more importantly retention of every important customer.

This course therefore, once again, takes a very practical approach towards developing the skills for Marketing Strategy and also Marketing Management to enable students to apply marketing, management and customer relationship management techniques, e-business systems and software programs that companies use in to their brand planning and day-to-

day management operations. This course also seeks to synthesize learning from previous courses taken, particularly related to entrepreneurship, organizational management, strategy and/or strategic management. Emphasis is on the role of owners, Chief Marketing Officers (CMOs), CEOs, Entrepreneurs, Managers, Marketing, Sales Directors and Customer Service Managers of companies and organizations in the context of *growing their company, while also implementing novel strategies and necessary supporting tactics for long-term sustainability.*

While there has been a lot of hype surrounding marketing and online digital marketing, there has also been some disillusionment with the results achieved by companies. Investments of millions of dollars in Social Media advertising (as an example) have, in many cases, yielded results of little value. Often Managers acknowledge a lack of focus on understanding how to improve the business and leverage the strength of marketing to increase revenue, but also cut costs. Managers also acknowledge an inability to harness the strength through refined customer analytics and customer strategy, to improve both their supply chain management, and also marketing in general. This course aims to cut through the hype and get to the core of the issues that affect a customer-firm relationship and a successful strategic marketing implementation.

The applied part of the course is explored at both the strategic and analytical level - the long-term brand planning and marketing planning stage - and at the customer relationship management and marketing implementation level, or short-term marketing decision- making/implementation stage. Once again, the point of view is always that of a CMO, Department Director or Manager or business owner who must direct, make decisions, (which are financially beneficial), and take action to ensure leadership in today's competitive marketplace. It will involve the development of a company's Strategic Marketing Plan and the rigorous review and strategic recommendation of various case study situations. The overall thinking behind this course is that of a seminar course format that will focus on class discussion and involvement of each student in the group. Between cases and business models, students will have a thorough understanding of over 20 companies' marketing and e-business strategies in building brand awareness, managing customer relationships and retaining customers to drive business sustainability.

Learning Objectives:

The overall objective of this course is to examine the strategic and analytical aspects of Marketing Strategy and tactical implementation so that participants will have a true understanding of the strength of Marketing for companies and their respective brands, but also how to put it to work effectively.

More importantly, at the end of this program, each participant should be able to:

1. Demonstrate an improved knowledge in the field of devising and implementing Marketing strategies at the brand awareness, business development and customer relationship management (CRM) levels for companies.

2. Leverage the most relevant and modern marketing techniques in the modern business environment which encompass variables such as online marketing, customer retention, customer relationship innovation, additional digital strategies in a growing business and other methods and technologies.
3. Apply the points of view of an effective Chief Marketing Officer (CMO), CEO (or owner), Director and/or Senior Manager who are required to grow the business, generate significant brand awareness, strengthen the communication with customers and retain an extensive customer base; but also to take those points-of-view and make effective marketing, e-business, distribution, and financial business decisions in today's digital business environment.
4. Deal with unprofitable customers and recovering from crises, while appropriately questioning and criticizing traditional Marketing techniques and systems and creating the most effective marketing strategy solutions.

Required Reading Material: A coursepack is available consisting of strategic marketing management articles from both Harvard Business Review (HBR) and Ivey Business School. The coursepack will be available at the University Bookstore in the University Centre.

Course Requirements & Methods of Evaluation:

Student assessment involves both individual and group components and requires students to use both classroom and field learning from readings and case studies. Specifically, the assessments are:

Marketing Strategy and Implementation Plan (Team Presentation and Based Written Report)	35%
Team Case-based Application Exercises	20%
Class participation: the course will be seminar based and allow opportunity for significant discussions, while also revolving around case situations. Preparation for class is very important and participation is a key part of the course.	10%
Final Exam	35%

NOTE: See APPENDIX #1 and APPENDIX #2 SAMPLE of a GRADING RUBRIC for the specific evaluation criteria AND also the required formats for each submission for this course.

Your final course grade will be a weighted average of each of the grading scheme components.

Teams:

Each team must designate a person to coordinate the delivery of projects via CU Learn, as well as providing both a final printed and an emailed copy (see due dates in course outline).

NOTE: You are responsible for managing your team, including highlighting opportunities for the group to improve and to continuously offer recommendations for the team to work effectively and efficiently together. If groups have serious differences, then it is required to show the Professor a detailed record of performance problems (i.e. emails, a file describing the problem, detailed challenges, detailed missed meetings, etc). I ask this of you, since this is in line with the human resources management of a modern company or organization. No more or no less.

Peer Evaluation:

A peer evaluation form is provided (see Appendix #3). Please use it to evaluate the members of your team on their contribution to the Team Application Exercises, Team Presentation AND Final Team Report. **NOTE: It is optional** and use it only if you feel that all group members did not contribute equally. **Please see Appendix #3 on CU Learn for the Peer Evaluation form. Forms can be submitted via email to the Professor AFTER the Final Team Report has been submitted, and BEFORE the Final Exam Schedule.**

Detailed Course Deliverable Evaluations:

Participation (10%):

In-class participation marks will be self-assessed based on the student's ability to present his/her arguments clearly and concisely, to raise questions that help generate discussion and illustrate concepts, and to demonstrate command of course concepts.

Participation will be self-assessed each week starting the second session. The evaluation will consist of three key questions:

1. Preparation
2. Class participation
3. Qualitative assessment of your classroom interventions (4 – 5 brief questions after each class)

To help you evaluate your quality of your participation in class, a score system is proposed below. **Note: The Professor of this course reserves the right to change your score if the review does not match the Professor's (and/or your peers') perception and actual reality of your contribution in the course. Should this occur, the Professor will communicate the change of your score to you by email.**

The weekly grade self-assessment should be as follows:

- 5-6 /10: student is present in most classes but rarely contributes to class discussions;
- 7-8 /10: student is present in every class and contributes by raising questions based on the readings, class material, or practical work experience that helps to advance the class's understanding of core concepts;
- 8+: student is present in every class and contributes questions, comments or additional information on issues based on class material, work experience, readings outside of the class, and/or material covered in other courses that stimulate a deeper exploration of issues critical to the practice of marketing.

Team Case-based Application Exercises:

These exercises will be presented by each *team*. The aim will be to implement a specific or series of strategic Marketing techniques which is related to sessions prior to the presentation dates, so to apply learning from the course to the presentations. Presentation content must always consider strategies related to the management of marketing linking to enhancing brand awareness, managing customer relationships, e-business and online marketing solutions, customer service management and/or sales management strategies. These exercises also give students the opportunity to practice strategic factors, recognize emerging Marketing strategies and analyze web business for marketing and sales tactics as well as managing customer relationships and growing businesses and organizations. Presentations will be a maximum of 10 minutes (excluding approximately 3 – 5 minutes for questions after the presentations), with all team members given the opportunity to present at least one slide.

NOTE #1: Questions for each case study will be posted for each case on CU Learn.

NOTE #2: See APPENDIX #1 for a **SAMPLE of GRADING RUBRIC and FORMAT for the Team Application Exercises**, which includes *the required format, but also detailed evaluation criteria* for each team application exercise presentation.

Value: Team Application Exercises (20% of total course grade).

Team Marketing Management Strategy & Implementation Plan:

This team based assignment should encompass a complete Marketing Strategy and Implementation plan (e.g. a plan for marketing, sales, customer service, customer loyalty, retaining customers, strategic business sustainability, etc.) for an *Ottawa-based actual business*. The plan should culminate with a series of recommendations based on rigorous analysis and strategic marketing planning for the owner(s) and/or Directors of the business. Students are required to identify a suitable small to medium-sized business and **this process should begin as soon as is possible after the course start dates**.

It is recommended that the business be a local business (i.e. operating out of the greater Ottawa area), so to teams can go to the actual location and observe, review and critique the marketing practices of the business.

Teams will analyze and develop Marketing Management strategies and effective tactics to allow the business to grow, gain market leadership, and most importantly be sustainable over a long period of time (i.e. 5 years and beyond) by retaining existing long-term and also acquiring new customers. This must also include financial implications of the recommended marketing strategies.

The completed Marketing Management Plan presentation and Marketing Plan report must be developed and submitted with the assumption that both are being presented and delivered to the business' Marketing Director, Sales Director and/or CEO or owner(s).

The following are the recommended 3 key steps (in detail) for the Marketing Management Plan:

Timeline:

<u>Step</u>	<u>Objective</u>	<u>Due Date</u>
Step #1:	Project Proposal	January 26 th
Step #2:	Market Research	Recommended by February 9 th
Step #3:	Final Team Presentation	March 23 rd
Step #4:	Final Team Written Report	2:35pm on Wednesday, April 11 th

Step #1: Project Proposal

A concise project proposal is to be submitted at the beginning of class on **January 26th**. This proposal is not graded but it must be approved before moving to step 2. It is a concise 1-page report which includes:

1. Briefly describe the Ottawa-based company and its product/service and why you have chosen this particular company for which to help from a strategic marketing and business expansion standpoint.
2. Research sources (online, library, news media, etc.)
3. Current strategic marketing management challenges of the business

Step #2: Market Research

Market research must be a key part of the information teams obtain to make strategic recommendations for the business' strategic marketing plan. This market research must include online sources and other media, etc directly linked to the marketing challenges and success of the business reviewed. It is recommended the market research be complete by the second week of February (approximately February 9th).

STEPS #3 and #4: Team Marketing Management Plan Presentation and Final Written Report:

Teams will draw from the learning from the course combined with the key findings from the site observation, marketing analysis of the company and the key interview with management or owner (who has control and direct influence over the organization's overall marketing) to develop and present sustainable, effective and results-oriented strategic marketing recommendations via a Team Presentation as well as a Final Written Report.

Once again, the presentation and final report should encompass a complete Marketing Strategy and Implementation plan (e.g. a plan for marketing, digital marketing, brand awareness and brand preference, sales, customer service, customer loyalty, retaining customers, strategic business sustainability, etc.) for an actual and existing business. *This should also include the financial implications of the recommended marketing strategies and practical implementation tactics that can be realistically be implemented.*

NOTE: The completed Marketing Plan presentation and Marketing Plan report must be developed and submitted with the assumption that both initiatives are being presented and delivered to the business' Marketing Director, Sales Director and/or CEO or owner(s).

STEP #3: TEAM PRESENTATION:

Teams will present their analysis, key findings, but more importantly their strategic marketing management recommendations and implementation plan for the Ottawa-based business. Team Marketing Plan Presentations will be a maximum of 12 minutes (which does not include questions from the audience), with all team members given the opportunity to present at least one slide.

It is recommended teams take the suggestions from the audience (during the question period), and incorporate the suggestions in to the Final Team Report. Team Presentations will occur on March 23rd.

NOTE #1: Teams must bring a printed copy of the slides to the presentation.

NOTE: See APPENDIX #2 (on CU Learn) for a SAMPLE of GRADING RUBRIC for the Final Team Marketing Strategy & Implementation Plan (Team Presentation and Final Team Report), which includes the:

- a) **Recommended outline**
- b) **Required format**
- c) **Evaluation criteria**

For each important part of the *Marketing Strategy and Implementation Plan Presentation AND Final Report.*

Value: 15% of total course grade.

STEP #4: Team Final Marketing Management Plan Report

After the team presentation, **it is encouraged to take the feedback and consider the questions from the audience to update and modify the recommendations for the Final Report.** Teams will then provide a completed report which will be no longer than 5,000 words (excluding appendices). Only the content within 5,000 words will be read and will be included as a part of the evaluation of the report. Any additional content (more than 5,000 words) will not be read and cannot be included as a part of the evaluation of the report.

NOTE: Both a printed report AND an emailed “Word” version of the same report must be submitted at the beginning of class by 2:35pm on Wednesday, April 6th. The printed version must be submitted **AND an emailed “Word” version of the same** report must be emailed to the Professor by 2:35pm on Wednesday, April 11th.

Please do not submit a PDF via email. Only Word versions will be accepted. Examples of topics will be discussed during the first seminar.

NOTE #2: Once again, see APPENDIX #2 for a **SAMPLE of GRADING RUBRIC, OUTLINE and FORMAT for the Team Presentation and Final Report,** which includes the recommended outline, the required format, but also the detailed evaluation criteria for the Strategic Marketing Management presentation and Final Report.

Value: 20% of total course grade.

Final Exam:

The final exam will occur during the formal Final Exam Schedule. It will draw on class material, supported by any articles, case studies, presentations AND discussions reviewed throughout the course. Request for deferrals must follow University policies and procedures.

Value: 35% of total course grade.

Course Policies & Procedures:

The principles of professionalism will always apply.

Communications

Information will be communicated during class on a regular basis. In addition, this information will be posted on CU Learn. This site will be the primary source for course materials including announcements, assignments, supplemental lecture slides, etc. Therefore, please check the course CU Learn site very regularly. In case of class cancellation due to inclement weather or other unforeseen circumstances, an announcement will be posted on CU Learn as soon as possible.

Late assignment process:

- 10% per day (note: for late submissions, an email version must be sent to the Professor, and only at the time will the time of submission occur).

Report and Presentation Formats:

- The principles of professionalism will apply.
- See APPENDIX #1 and APPENDIX #2 for format requirements for submissions and presentations for this course.

Email process:

- Please only use your Carleton University account. Any other email might be treated as spam and might not be read.
- Once again, note that Carleton University requires that you use your Carleton email account.
- Albeit emails will be responded at the earliest, plan accordingly as emails might take up to 24 hours for a response.

Course Schedule: Fridays 2:35pm – 5:25pm

<u>Date</u>	<u>Lecture Theme & issues</u>	<u>Relevant Article Readings</u>	<u>Case / Assignments</u>
January 12	Developing Strategic Marketing Management Intelligence	<i>Course Syllabus & outline Review and In-class Lecture Notes / Slide Presentations</i>	Review for the Team Marketing Strategy & Implementation Plan
January 19	The Fundamentals to Marketing Management Core Components to the NEW Marketing Paradigm	<i>In-class Lecture Notes / Slide Presentations</i>	Participation #1
January 26	The Strategic Brand Plan Process Strategic Market Management Analysis, Segmentation, Target Market and Brand Positioning	<i>Marketing Segmentation, Target Market Selection and Positioning (Sarvary & Elberse, 2006)</i> <i>Worried About Strategy Implementation? Don't overlook Marketing's Role (Slater et al.)</i>	Participation #2 BRIEF PROJECT PROPOSAL DUE: at the beginning of class
February 2	Detailed Brand Strategies & Digital Marketing Management Implementation Marketing Management Expenditures and Customer Equity	<i>Basics of Branding Marketing Today: Branding for Digital Marketing and Social Media (Gronlund, 2013)</i> <i>Marketing When Customer Equity Matters (Hanssens et al.)</i>	Participation #3 In-class Preparation Exercise
February 9	Digital Marketing Management (continued) and online marketing media tactics	<i>Crowdsourcing in a Time of Empowered Stakeholders: Lessons from Crowdsourcing Campaigns (Wilson et al.)</i>	Participation #4 TEAM APPLICATION EXERCISE #1: Team A: LuluLemon Athletica Team B: McKenzie & Marr

February 16	Strategic Social Marketing Management Value Proposition; Metrics and Evaluation of Marketing Tactics & the Price Optimization Model	<i>Competing on Social Purpose (Vila & Bharadwaj)</i> <i>Marketing Metrics: A Note for Marketing Managers (Stanko & Fleming)</i>	Participation #5
February 23	N/A	Reading Week	
March 2	Management in the Information Age Marketing NEW Paradigm – Part II Driving Brand Awareness through Events	<i>Beyond the 4 Ps: A New Marketing Paradigm Emerges (Wind)</i> <i>How to Create a “Lights out” Customer Experience (Watson)</i>	Participation #6
March 9	Mastering Strategy in Marketing Management	<i>Mastering Strategy (Mangelsdorf)</i>	Participation #7 TEAM APPLICATION EXERCISE #2: Team A: Wolo Team B: Coca Cola Green
March 16	Marketing Management Ethics and the Threshold for Brand Impact	<i>Ads that Don’t Overstep (John)</i>	Participation #8
March 23	Marketing Plans – Marketing Opportunities		Participation #9 TEAM MARKETING PRESENTATIONS
April 6	Strategic Marketing Management in the Information Age and the Innovator’s Marketing Dilemma	<i>A Managers Guide to Augmented Reality (Porter et al.)</i>	Participation #10
Wednesday, April 11	Marketing Management Leadership and Final Exam Preparation	<i>Turning Potential into Success: The Missing Link in Leadership Development (Fernandaz-Araoz et al.)</i>	Participation #11 DUE: FINAL MARKETING MANAGEMENT PLAN @ 2:35pm at the beginning of class and an emailed “Word” version

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 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 in the school for several reasons. They provide you with opportunities to develop and enhance interpersonal, communication, leadership, follower-ship 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.

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, Accommodations, Etc.

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 Accommodations

For Students with Disabilities:

The Paul Menton Centre for Students with Disabilities (PMC) provides services to students with Learning Disabilities (LD), psychiatric/mental health disabilities, Attention Deficit Hyperactivity Disorder (ADHD), Autism Spectrum Disorders (ASD), chronic medical conditions, and impairments in mobility, hearing, and vision. If you have a disability requiring academic accommodations in this course, please contact PMC at 613-520-6608 or pmc@carleton.ca for a formal evaluation. If you are

already registered with the PMC, contact your PMC coordinator to send me your **Letter of Accommodation** at the beginning of the term, and no later than two weeks before the first in-class scheduled test or exam requiring accommodation (*if applicable*). **Requests made within two weeks will be reviewed on a case-by-case basis.** After requesting accommodation from PMC, meet with me to ensure accommodation arrangements are made. Please consult the PMC website (www.carleton.ca/pmc) for the deadline to request accommodations for the formally-scheduled exam (*if applicable*).

For Religious Obligations:

Students requesting academic accommodation on the basis of religious obligation should make a formal, written request to their instructors for alternate dates and/or means of satisfying academic requirements. Such requests should be made during the first two weeks of class, or as soon as possible after the need for accommodation is known to exist, but no later than two weeks before the compulsory event.

Accommodation is to be worked out directly and on an individual basis between the student and the instructor(s) involved. Instructors will make accommodations in a way that avoids academic disadvantage to the student.

Students and instructors can confirm accommodation eligibility of a religious event or practice by referring to the Equity Services website (<http://carleton.ca/equity/accommodation/religious-observances/>) for a list of holy days and Carleton's Academic Accommodation policies. If there are any questions on the part of the student or instructor, they can be directed to an Equity Services Advisor in the Equity Services Department for assistance.

For Pregnancy:

Pregnant students requiring academic accommodations are encouraged to contact an Equity Advisor in Equity Services to complete a letter of accommodation. The student must then make an appointment to discuss her needs with the instructor at least two weeks prior to the first academic event in which it is anticipated the accommodation will be required.

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. 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/>.

Sprott Student Services

The Sprott student services office, located in 710 Dunton Tower, offers academic advising, study skills

advising, and overall academic success support. If you are having a difficult time with this course or others, or just need some guidance on how to successfully complete your Sprott degree, please drop in any weekday between 8:30am and 4:30pm. Our advisors are happy to discuss grades, course selection, tutoring, concentrations, and will ensure that you get connected with the resources you need to succeed! <http://sprott.carleton.ca/students/undergraduate/learning-support/>

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 hard 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 <http://carleton.ca/ccs/students/>
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