



BUSI 4201A
Marketing Metrics
Fall 2022

Last updated on September 3, 2022

Instructor: Dr. Irene Lu
Email: irene.lu@carleton.ca
Class Time: Thursdays, 8:35am –11:25am
Classroom: NI 4030
Office Hours: By appointment

*All quizzes and tests will take place in person at NI 4030. Students are required to bring a laptop to write the quizzes and tests.

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.

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.

COURSE PREREQUISITES

BUSI 1005, BUSI 2208, open to BCom, BIB, all Minors (note: able to count as Marketing elective)

COURSE 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:

- a) develop expertise in using numerical information to justify and evaluate marketing strategies
- b) be able to correctly select, calculate, and interpret specific marketing metrics for

- marketing decisions and articulate returns on marketing investment
- c) understand the connections across various marketing metrics

RECOMMENDED BOOKS (Not Required):

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. eText ISBN-13: 978-0-13-671713-3; eText ISBN-10: 0-13-671713-6.

COURSE NORMS:

Use of Brightspace

The course Brightspace website contains all the pertinent course information. This site will be the primary source for course announcements and distribution of materials including assignments, supplemental readings, etc. Grades will be posted to Brightspace as soon as they become available. To access your courses on Brightspace go to <https://carleton.ca/brightspace>. For help and support, go to <https://carleton.ca/brightspace/students>.

Email Policy

The best way to contact the professor is to send her an email via Brightspace. If you wish to send her an email directly, please be sure to **indicate “BUSI 4201” in your email’s subject line**, so that she will know which of the classes she is teaching you are taking. In keeping with Carleton University policy, your @cmail or @carleton email accounts must be used for any enquiries which involve confidential student information (e.g., about grades or health issues). The professor does not respond to student emails over the weekend. During the week the professor will endeavor to answer your emails within 48 hours; you should not expect an immediate response. She will also not answer by email questions that have already been asked and answered in class. Please use the Brightspace course Forum (discussion board) to ascertain whether your classmates can assist you.

Course Material Sharing Policy

Student or professor materials created for this course (including posted notes/slides, quizzes, and exams etc.) 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)**.

Recording or Videotaping Policy

Students are **not authorized to make a copy of the recorded class**; it is provided for viewing purposes of students enrolled in the class only and further distribution or sharing is strictly prohibited. Students are not permitted to audio or video record any portion of the class lectures, nor are you permitted to make digital images of the lecture slides.

MARK ALLOCATION (Tentative and subject to change)

Grading Component	Weight
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%

EVALUATION CRITERIA

1. Quizzes and Tests

All quizzes and tests are closed book and closed note. Students are 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 7, 11:59pm, EST**. Students who pass the exam will receive 10% of the final grade. For those students who fail the exam, their exam score will be counted toward their final grade. For example, a student with an exam score of 70 will receive 7% of the final grade.

CLASS OUTLINE/SCHEDULE (Tentative and subject to change)

Session	Date	Content	Note
1	Sept 8	Course Administration Overview An Introduction to Marketing Metrics	
2	Sept 15	Module A: Share Metrics (Part 1)	
3	Sept 22	Module A: Share Metrics (Part 2)	
4	Sept 29	Module B: Margins and Profits (Part 1) Quiz #1 on Module A	In person Use your own laptop Duration: 20 minutes Sept 29 (10:30-10:50am) Location: NI 4030
		After reviewing Module B, do MBTN's online evaluation practice modules: -Introduction to Margins -Calculating margins -Breakeven Analysis -Profit Dynamics	
5	Oct 6	Module B: Margins and Profits (Part 2) Module C: Pricing (Part 1)	
6	Oct 13	Module C: Pricing (Part 2) Quiz #2 on Modules B and C (Part 1)	In person Use your own laptop Duration: 20 minutes Oct 13 (10:30-10:50am) Location: NI 4030
7	Oct 20	Test #1 on Modules A, B, &C	In person Use your own laptop Duration: 130 minutes Oct 20 (9:15-11:25am) Location: NI 4030
		<i>Fall Break (Oct 24-28)</i>	
8	Nov 3	Module D: Product and Portfolio Management Module E: Sales Force Management After reviewing Modules D & E, do MBTN's "Cannibalization" online evaluation practice module. Take MBTN's Profit Impact Metrics Certificate Exam.	

9	Nov 10	Test #2 on Modules D&E	In person Use your own laptop Duration: 105 minutes Nov 10 (9:15-11:00am) Location: NI 4030
10	Nov 17	Module F: Promotion Profitability	
11	Nov 24	Module G: Customer Profitability	
		Quiz #3 on Module F	In person Use your own laptop Duration: 20 minutes Nov 24 (10:30-10:50am) Location: NI 4030
12	Dec 1	Test #3 on Modules F&G	In person Use your own laptop Duration: 105 minutes Dec 1st (9:15-11:00am) Location: NI 4030
	Dec 8	Deadline for last attempt at MBTN “Profit Impact Metrics” certificate exam: Dec 8, 11:59pm, EST	

Module Contents

Module A:	Module B:	Module C:	Module D:
Share metrics	Margins and profits	Pricing	Product and portfolio management
market share	variable and fixed costs	price premium	trial volume and trial rate
relative market share	margins		repeat volume and repeat rate
market concentration	markups	maximum reservation price and maximum willingness to buy	adjusted trial rate
market penetration	channel margins	price elasticity	product introduction forecasted volume
brand penetration	average price per unit	optimal price	cannibalization rate
penetration share	contribution per unit	% breakeven price change	weighted contribution margin
share of requirements	contribution margin		breakeven with cannibalization
heavy usage index	breakeven sales level	price discrimination / segmented pricing	
market share decomposition	target profit		
brand development index	rate of return on sales	competitor reaction elasticity, and cross and residual price elasticity	
category development index	breakeven on incremental investment		
Module E:	Module F:	Module G:	
Sales force management	Promotion profitability	Customer profitability	
sales funnel	baseline sales	share of voice	customer lifetime value
sales pipeline	incremental sales	pageviews	retention rate
lead	promotional lift	visits	attrition rate
closure rate	return on marketing investment	visitors	churn rate
sales forecasting	coupon redemption	clickthrough rates	
workload	pass-through	cost per click	
sales force effectiveness	gross rating points	cost per order	
	impression	cost per customer acquired	
	cost per thousand impressions	bounce rate	
	reach	abandonment rate	
	frequency		

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
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 persuasive in their communications.</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 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.

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

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: carleton.ca/equity/wp-content/uploads/Student-Guide-to-Academic-Accommodation.pdf

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: carleton.ca/equity/wp-content/uploads/Student-Guide-to-Academic-Accommodation.pdf

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: carleton.ca/sexual-violence-support

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/>
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COVID-19

It is important to remember that COVID is still present in Ottawa. The situation can change at any time and the risks of new variants and outbreaks are very real. There are [a number of actions you can take](#) to lower your risk and the risk you pose to those around you including being vaccinated, wearing a mask, staying home when you're sick, washing your hands and maintaining proper respiratory and cough etiquette.

Feeling sick? Remaining vigilant and not attending work or school when sick or with symptoms is critically important. If you feel ill or exhibit COVID-19 symptoms do not come to class or campus. If you feel ill or exhibit symptoms while on campus or in class, please leave campus immediately. In all situations, you must follow Carleton's [symptom reporting protocols](#).

Masks: Carleton has paused the [COVID-19 Mask Policy](#), but continues to strongly recommend masking when indoors, particularly if physical distancing cannot be maintained. It may become necessary to quickly reinstate the mask requirement if pandemic circumstances were to change.

Vaccines: Further, while proof of vaccination is no longer required as of May 1 to attend campus or in-person activity, it may become necessary for the University to bring back proof of vaccination requirements on short notice if the situation and public health advice changes. Students are strongly encouraged to get a full course of vaccination, including booster doses as soon as they are eligible, and submit their booster dose information in [cuScreen](#) as soon as possible. Please note that Carleton cannot guarantee that it will be able to offer virtual or hybrid learning options for those who are unable to attend the campus.

All members of the Carleton community are required to follow requirements and guidelines regarding health and safety which may change from time to time. For the most recent information about Carleton's COVID-19 response and health and safety requirements please see the [University's COVID-19 website](#) and review the [Frequently Asked Questions \(FAQs\)](#). Should you have additional questions after reviewing, please contact covidinfo@carleton.ca.