

**MKTG 5200 Section A & B**  
**Marketing Strategy**  
**Winter 2024**

**Instructor:** Dr. Dora (Yun) Wang  
**Email:** dora.wang@carleton.ca  
**Office Hours:** By appointment

**Class Meeting:** Section A – Thursdays, 2:35 – 5:25 pm; Section B – Tuesdays, 6:05 – 8:55 pm

**Course Calendar Description:**

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.

**Course 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.

**Course Prerequisites:** None

**Required Materials:**

Textbook(s): Philip T. Kotler, Kevin Lane Keller (2016), A Framework for Marketing Management, Sixth Edition ISBN-13: 9780133871319

**Drop Course Policy:** The deadline for academic withdrawal is **February 1** for early-winter courses and **March 15** for late-winter and full-winter courses.

**Grading Scheme:**

Written Case Analysis #1	15%
Midterm Exam (48 Hour Case Analysis)	20%
Written Case Analysis #2	15%
Contribution to Class Discussion	10%
Group Project	30%
Group Project Presentation	10%
<b>TOTAL</b>	<b>100%</b>

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.

- Written Case Analyses: Two of the cases discussed in class will also serve as written assignments. Your task is to prepare a consultant's report for the company. Case Analysis #1 is limited to 2,000 words (plus appendices); you will be tasked with sizing up the key problems / opportunities raised by the case and identifying and evaluating strategic alternatives. Case Analysis #2 is limited to 3,000 words (plus appendices); in addition to the situation analysis and evaluation of alternatives, you will also need to propose a specific course of action for the decision-maker.
- Midterm Exam (48 Hour Case Analysis): You will be expected to read a short case and provide written analysis and recommendations to the decision-maker about what strategic option s/he should pursue and why. You will have approximately 48 hours to read the case and prepare your recommendations in 2,500 words or less (plus appendices).

- Contribution to Class Discussion: The professor will evaluate your overall contribution to the class discussion (both lecture and case discussions). 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.
- Group Project: Working in a group of three to five, you will identify a client organization facing a marketing problem/opportunity (both the client and the problem/opportunity must be approved by the professor). 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.
- Group Project Presentation: 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.

#### **Late Assignments:**

If you are unable to attend class on the day an assignment is due, it is your responsibility to ensure that I receive a copy of your assignment prior to the deadline. Submissions sent via e-mail will be accepted, but only if successfully received (i.e., claiming that an e-mail was sent, but not delivered, does not constitute acceptable grounds for accommodation). Requests for extension will be considered in cases of illness or other exceptional circumstances. To ensure fairness for all students, penalties will be applied to late assignments: Failure to submit an assignment on time will result in an initial penalty of five (5) percentage points, followed by an additional (2) percentage points per day thereafter. For example, an assignment that would normally merit a grade of 80% would receive a grade of 75% if submitted after the deadline on the due date, 73% if submitted the following day, and so on. Requests for extension will be considered in cases of illness, family emergency, or other exceptional circumstances.

#### **Deferred Final Assignment:**

Students unable to complete the final project due to illness or other circumstances beyond their control must contact me in writing to request a deferral. Permission may be granted if the absence is supported by a medical certificate and or appropriate document(s) to support the reason for the deferral.

#### **Preparation and Participation:**

A satisfying case discussion experience requires rigorous preparation prior to class. To that end, you are encouraged to form a discussion group consisting of 3-5 individuals, and meet prior to each class to review that week's case. Although this is not required, it enhances 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.

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

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

## 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 should take 100 points and allocate those points to the various members of the group (including him/her/themself) to reflect the contributions made by each member. For instance, if there are four members in a group and everyone contributed equally, each individual would receive 25 points. Conversely, if an individual contributed relatively little, the remaining group members might allocate few points to that member. 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:**

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

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

- **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](mailto: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: <https://carleton.ca/sexual-violence-support/>

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

**COURSE SCHEDULE**  
(Section B / Section A)

<b>Week</b>	<b>Day</b>	<b>Topic/Agenda</b>	<b>Pre-class Prep</b>
1	Jan. 9 <i>Jan. 11</i>	Course overview Strategic role of marketing	Chapter 1
2	Jan. 16 <i>Jan. 18</i>	Understanding the market Marketing strategy and planning	Chapters 2, 3 Case: TBD
3	Jan. 23 <i>Jan. 25</i>	Customer value  <b>Submit group list &amp; group member names</b>	Chapters 4, 5 Case: TBD
4	Jan. 30 <i>Feb. 1</i>	Market segmentation and positioning <b>Submit case #1</b>	Chapters 6, 7, 8 Case: TBD
5	Feb. 6 <i>Feb. 8</i>	Library Information Session	
6	Feb. 13 <i>Feb. 15</i>	Product	Chapters 9, 10
Winter break. No class. <b>48-hour Mid-term Case</b>			
7	Feb. 27 <i>Feb. 29</i>	Pricing	Chapter 11 Case: TBD
8	Mar. 5 <i>Mar. 7</i>	Place  <b>Submit case #2</b>	Chapters 12, 13 Case: TBD
9	Mar. 12 <i>Mar. 14</i>	Promotion	Chapters 14-17 Case: TBD
10	Mar. 19 <i>Mar. 21</i>	Promotion (continued)	Chapters 14-17 Case: TBD
11	Mar. 26 <i>Mar. 28</i>	Promotion (continued) & Wrap-up	
12	Apr. 2 <i>Apr. 4</i>	Group presentations  <b>Submit group marketing report</b> <b>Submit group presentations</b>	

**\* Speakers, Schedule and Readings:**

This semester may include guest speakers, and additional readings on a particular topic may occasionally be assigned. While every attempt will be made to keep to the schedule listed above, unforeseen circumstances and availability of guest speaker(s) may necessitate modifications throughout the semester (including assignments, readings and topics). I will keep you informed of changes via Brightspace.

\*While every attempt will be made to keep to the schedule listed above, unforeseen circumstances may necessitate modifications throughout the semester.

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