



**MKTG 5200  
Marketing Strategy  
Winter 2019**

**WED 6:05–8:55 p.m. DT 328 (Section D)**

**THU 2:35–5:25 p.m. DT 328 (Section A)**

**Instructor: Dr. Robin Ritchie**

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Office Hours: Wed 3:00–5:00 p.m. or by appointment

**MKTG 5200 [0.5 credit]**

**Marketing Strategy**

Essential concepts for cultivating and maintaining successful buyer-seller relationships, including customer and competitor analysis, segmentation, targeting, and positioning. Translation of target market and positioning decisions into actionable marketing plans, including product, pricing, channel and 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.

**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

**Textbook (Required):** MM4 (2013). 4th ed., Southwestern College (Nelson), ISBN [1133629385](#).  
(Available mid-January from the Carleton bookstore for approximately \$90.)

**Drop Course Policy:** The deadline for academic withdrawal is the last day of classes (each term).

**Grading Scheme:**

Written Case Analysis #1	15%
Midterm Exam (48 Hour Case Analysis)	20%
Written Case Analysis #2	25%
Contribution to Class Discussion	10%
Group Project Proposal	10%
Group Project Consulting Report	20%
<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: I 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 Proposal: Working in a group of four, you will identify a client organization facing a marketing problem/opportunity (both the client and the problem/opportunity must be approved by me). You will then prepare a 2,000-word 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.
- Group Project Consulting Report: Working from your proposal, your group will prepare a 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.

### **Instructions for Submitting Written Assignments:**

Assignments are due at the beginning of class. To simplify the grading process, I ask that you submit a hard copy of all written assignments during our regular class session on the day the assignment is due (this is the copy that will be read and graded) and upload an electronic version to cuLearn (to serve as a backup in case the hard copy is damaged or misplaced). You should also retain a duplicate hard copy of all work submitted.

### **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.

### **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 3-4 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.

### **Group Work:**

The Sprott School of Business encourages group assignments, as 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. Two graded components in this course—the project proposal and the final consulting report—are group assignments; all other assignments should be completed individually. 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. I will use this information 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 or herself) to reflect the contributions made by each member. For instance, if there are 4 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.

### **Academic Integrity:**

Violations of academic integrity are a serious academic offence. Such violations—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 expulsion; suspension from all studies at Carleton; suspension from full-time studies; a refusal of permission to continue or to register in a specific degree program; academic probation; and a grade of Failure in the course, 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: [carleton.ca/registrar/academic-integrity/](http://carleton.ca/registrar/academic-integrity/).

## Requests for Academic Accommodation:

In some cases, students may need special arrangements to meet their academic obligations during the term. The processes for an accommodation request 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:

[carleton.ca/equity/wp-content/uploads/Student-Guide-to-Academic-Accommodation.pdf](http://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](http://carleton.ca/equity/wp-content/uploads/Student-Guide-to-Academic-Accommodation.pdf)

- **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](http://carleton.ca/sexual-violence-support)

- **Accommodation 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](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. [carleton.ca/pmc](http://carleton.ca/pmc)

- **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 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.

[carleton.ca/senate/wp-content/uploads/Accommodation-for-Student-Activities-1.pdf](http://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](http://students.carleton.ca/course-outline).

**Course Sharing Websites:**

Student or professor materials created for this course (including presentations, 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 written consent of the author(s).

**Policy on Mobile Devices:**

The use of mobile devices is disruptive to learning and is not permitted in this class. If you carry such a device to class, please make sure it is turned off. If an emergency situation requires you to keep it turned on, please discuss this with me prior to class.

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

Week	Date	Topics/Agenda	Pre-class Prep
1	Jan 9 Jan 10	<ul style="list-style-type: none"> <li>Strategic role of marketing</li> <li>Developing marketing plans</li> </ul>	<b>Read:</b> Ch.1 <b>Case:</b> Carvel Ice Cream *
2	Jan 16 Jan 17	<ul style="list-style-type: none"> <li>Understanding markets and the marketing environment</li> </ul>	<b>Read:</b> Ch.2, Ch.15 <b>Case:</b> Fairmont Hotels
3	Jan 23 Jan 24	<ul style="list-style-type: none"> <li>Analyzing customers</li> <li>Identifying market segments &amp; targets</li> </ul>	<b>Read:</b> Ch.3, Ch.4 <b>Case:</b> Unilever Canada: Redefining the Axe Brand
4	Jan 30 Jan 31	<ul style="list-style-type: none"> <li>Creating value, satisfaction, and loyalty</li> </ul> <p style="text-align: center;"><b>▶ WRITTEN CASE ANALYSIS DUE</b></p>	<b>Read:</b> Ch.14 <b>Case:</b> Local Lion Coffee Shop
5	Feb 6 Feb 7	<ul style="list-style-type: none"> <li>Creating brand equity</li> </ul>	<b>Read:</b> Ch.6 <b>Case:</b> Kraft Foods Canada: Targeting Millennials
6	Feb 13 Feb 14	<ul style="list-style-type: none"> <li>Crafting the brand positioning</li> <li>Dealing with competition</li> </ul>	<b>Read:</b> Ch.7 <b>Case:</b> Developing a Superior Positioning Concept
WINTER BREAK		<b>▶ NO CLASS</b>	

\* The case coursepack is available as a digital download from the Ivey Publishing website (fees apply):

1. Log in to your existing account or click "Register" to create a new account and follow the prompts to complete the registration. If registering, choose the "Student User" role.
2. Click on this link: <https://www.iveycases.com/CoursepackView.aspx?id=21303>
3. Click "Add to Cart".
4. Check "digital download" and click "OK".
5. Go to the Shopping Cart (located at the top of the page), click "Checkout", and complete the process.
6. When payment has been processed, an Order Confirmation will be emailed to you immediately and you will see the Order Confirmation screen.
7. Click "Download your Digital Items" or go to "My Orders" to access the file.

EXAM	WEEK		
		▶ <b>48-HOUR CASE ANALYSIS DUE</b>	
7	Mar 6 Mar 7	<ul style="list-style-type: none"> <li>Setting product strategy</li> <li>Introducing new market offerings</li> </ul>	Read: Ch.8 Case: SodaStream Takes on Coke and Pepsi
8	Mar 13 Mar 14	<ul style="list-style-type: none"> <li>Developing pricing strategies / programs</li> </ul>	Read: Ch.9 Case: A Couple of Squares: Pricing for the Future
9	Mar 20 Mar 21	<ul style="list-style-type: none"> <li>Designing advertising messages and managing integrated marketing communications</li> </ul>	<b>Read:</b> Ch.11, Ch.12 <b>Case:</b> Kraft General Foods: Post Children's Cereals
10	Mar 27 Mar 28	<ul style="list-style-type: none"> <li>Managing digital and social media, sponsorship, and influencer marketing</li> </ul> <p>▶ <b>WRITTEN CASE ANALYSIS DUE</b></p>	<b>Read:</b> Ch.13 <b>Case:</b> Anheuser-Busch InBev: Budweiser in Canada
11	Apr 3 Apr 4	<ul style="list-style-type: none"> <li>Designing and managing value networks and channels</li> </ul> <p>▶ <b>GROUP PROJECT PROPOSAL DUE</b></p>	<b>Read:</b> Ch.10 <b>Case:</b> Rayovac Corporation The Rechargeable Battery Opportunity
12	Apr 10 Apr 11	<ul style="list-style-type: none"> <li>Managing retailing, wholesaling &amp; logistics</li> </ul>	<b>Read:</b> Ch.17 <b>Case:</b> Amazon Go: Venturing into Traditional Retail

**Important Dates & Deadlines: Winter Term 2019**

<https://sprott.carleton.ca/students/mba/dates-deadlines-policies/>