



**MKTG 5200  
Marketing Strategy  
Winter 2017**

**TUE 11:35 a.m.–2:25 p.m. DT 328 (Section A)**

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

**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.

**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 gain a strategic perspective on the role of marketing. 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 understand and be able to apply relevant marketing concepts. You should leave this course with a clear understanding of concepts that are critical to marketing strategy formulation. You should also be able to leverage this understanding to solve real-life business problems.
3. To become comfortable with the process of making sensible marketing decisions. You should leave this course with an ability to analyze an organization's environment, develop a viable set of marketing strategies, and select the most appropriate one for the given context.
4. To become familiar with the decisions involved in translating target market selection and positioning into actionable marketing plans. You should leave this course with a clear sense of the marketing mix decisions that managers must make to implement their marketing plans.
5. To develop a basis for making these marketing mix decisions. You should leave this course with a framework for making decisions regarding the product offering, pricing, distribution, and promotion.
6. To develop your skills in developing actionable marketing plans. You should leave this course with a heightened ability to translate business problems into specific, profitable marketing action plans.

**Course Restrictions:** Enrolment in the Sprott MBA program, or permission of MBA Program Office

**Course Prerequisites:** None

**Textbook (Required):** MM4 (2013). 4th ed., Southwestern College (Nelson), ISBN [1133629385](#).  
(Available mid-January from the Carleton bookstore for approximately \$85.)

**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 (24 Hour Case Analysis)	20%
Written Case Analysis #2	25%
Contribution to Class Discussion	15%
Final Group Project	25%
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<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 we will discuss during the term will also serve as written assignments. Your task is to prepare a consultant's report that sizes up the key problems / opportunities raised by the case, identifies the main strategic alternatives, and proposes a specific course of action for the decision-maker. The report for Case Analysis #1 is

limited to 2,000 words (approximately 8 pages). For Case Analysis #2, you are limited to 3,000 words (approximately 12 pages).

- 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 (approximately 10 pages) or less.
- 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.
- Final Project: Working in a group of no more than four individuals, you will identify a client organization facing a problem / opportunity that is of interest to you and summarize your proposed project in 750 words or less. Both the client and the problem / opportunity must be explicitly approved by me. Once approved, you will prepare a 5,000-word consultant's report summarizing your assessment of the situation, identifying viable alternatives, and proposing a specific course of action with respect to 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 require students to 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 (this will 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.**

#### **A Note About Case Discussions:**

A satisfying case discussion experience requires rigorous preparation prior to class. To that end, you are encouraged to form a team consisting of 3-4 individuals, and meet prior to each class to discuss that week's case. Although this is not required, you will find that this 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.

### **A Note About 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 good for learning integrative skills for putting together a complex task. Your final project in this course is a group assignment. All others should be completed individually.

#### **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 then use this peer evaluation data when assigning the grade for the final project. The specific procedure is as follows: Each student will 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. You will be asked to provide this information **twice**. Once approximately 10 days before the report is due (in order to flag potential problems), and a second time after your report has been submitted (to be used when assigning grades).

### **Deferred Final Assignment:**

Students unable to complete their final project because of illness or other circumstances beyond their control must contact the instructor in writing to request a deferred exam. Permission may be granted when the absence is supported by a medical certificate and or appropriate document/s to support the reason for the deferral. Deferrals are not granted for students who have made travel arrangements that conflict with the completion of their assignments.

### **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).

### **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.

### **Person 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](mailto: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. Consult the PMC website ([www.carleton.ca/pmc](http://www.carleton.ca/pmc)) for the deadline to request accommodation for the formally-scheduled exam (*if applicable*). The deadline for contacting the Paul Menton Centre regarding accommodation for final exams for the April 2017 exam period is **March 10, 2017**.

### **Religious Observance**

Students requesting academic accommodation on the basis of religious observance 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 academic 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 or instructors who have questions or want to confirm accommodation eligibility of a religious event or practice may refer to the Equity Services website for a list of holy days and Carleton's Academic Accommodation policies, or may contact an Equity Services Advisor in the Equity Services Department for assistance.

### **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. 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: <http://carleton.ca/studentaffairs/academic-integrity>

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

Week	Date	Topics/Agenda	Pre-class Prep
1	Jan 10 Jan 11	<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 17 Jan 18	<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 24 Jan 25	<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> Investorsoft
4	Jan 31 Feb 1	<ul style="list-style-type: none"> <li>Creating value, satisfaction, and loyalty</li> </ul>	<b>Read:</b> Ch.14 <b>Case:</b> Coca-Cola Goes Green: Launch of Coke Life
5	Feb 7 Feb 8	<ul style="list-style-type: none"> <li>Creating brand equity</li> </ul> <p style="text-align: center;"><b>▶ WRITTEN CASE ANALYSIS DUE</b></p>	<b>Read:</b> Ch.6 <b>Case:</b> Unilever Canada: Redefining the Axe Brand
6	Feb 14 Feb 15	<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> Black & Decker
WINTER BREAK		<p style="text-align: center;"><b>▶ NO CLASS</b></p>	

\* The case course pack will be available as a digital download from the Ivey Publishing website (fees apply).

Details will be posted on cuLearn and distributed via email.

EXAM WEEK		▶ 48-HOUR CASE ANALYSIS DUE	
7	Mar 7 Mar 8	<ul style="list-style-type: none"> <li>• Setting product strategy</li> <li>• Introducing new market offerings</li> </ul>	<b>Read:</b> Ch.8 <b>Case:</b> SodaStream Takes on Coke and Pepsi
8	Mar 14 Mar 15	<ul style="list-style-type: none"> <li>• Developing pricing strategies / programs</li> </ul>	<b>Read:</b> Ch.9 <b>Case:</b> A Couple of Squares: Pricing for the Future
9	Mar 21 Mar 22	<ul style="list-style-type: none"> <li>• Designing and managing value networks and channels</li> </ul>	<b>Read:</b> Ch.10 <b>Case:</b> Rayovac Corporation The Rechargeable Battery Opportunity
10	Mar 28 Mar 29	<ul style="list-style-type: none"> <li>• Managing retailing, wholesaling &amp; logistics</li> </ul> <p>▶ WRITTEN CASE ANALYSIS DUE</p>	<b>Read:</b> Ch.17 <b>Case:</b> Showrooming at Best Buy
11	Apr 4 Apr 5	<ul style="list-style-type: none"> <li>• Designing and managing marketing communications</li> </ul>	<b>Read:</b> Ch.11,Ch.12 <b>Case:</b> Post Cereals
12	Apr 11 Apr 12	<ul style="list-style-type: none"> <li>• Managing personal communications and leveraging social media</li> </ul>	<b>Read:</b> Ch.13 <b>Case:</b> Matchstick

## **IMPORTANT DATES & DEADLINES – WINTER TERM 2017**

### **January 5**

Winter Term Begins. Classes begin.

### **January 18**

Last day of registration for Winter Term courses.

Last day to change courses or sections (including auditing) for Winter Term courses.

### **January 20-22, 27-29**

Fall deferred final examinations held.

### **January 31**

Last day to withdraw from Fall term and Fall/Winter courses with a full fee adjustment. Withdrawals after this date will create no financial change to Fall term fees (financial withdrawal).

### **February 17**

April examination schedule available online.

### **February 20**

Statutory holiday, University closed.

### **February 20-24**

Winter break. No classes.

### **March 1**

Last day for UHIP refund applications for International Students graduating this academic year.

Last day for receipt of applications from potential spring (June) graduates.

Last day for receipt of applications for admission to an undergraduate program for the summer term.

### **March 10**

Last day to submit, to the Paul Menton Centre for Students with Disabilities, Formal Examination Accommodation Forms for April examinations. Late requests will be considered on a case-by-case basis.

### **March 20**

Last day to pay any remaining balance on your Student Account to avoid a hold on access to marks through Carleton Central and the release of transcripts and other official documents. An account balance may delay Summer 2017 course selection.

### **March 24**

Last day for tests or examinations in courses below the 4000-level before the final examination period (see Examinations Regulations in the Academic Regulations of the University section of the calendar).

### **April 7**

Winter term ends.

Last day of Winter-term classes.

Last day for academic withdrawal from Winter term courses.

Last day for handing in-term work and the last day that can be specified by a course instructor as a due date for term work for Winter term courses.

**April 10-25**

Final examinations in Winter term and Fall/Winter courses may be held. Examinations are normally held all seven days of the week.

**April 14**

Statutory holiday. University closed.

**April 25**

All take home examinations due.