MKTG5211I – Technology Marketing
Summer 2022

Professor:	Dr. Robert Helal
Email:	robert.helal@carleton.ca
Room:	Nicol Building 3030
	(Check room prior to first class. Changes may be applied.)
Office Hours:	by appointment
Class Schedule:	Wednesday 18:05-20:55
Modality:	In-Person.
	Note: Modality may change in response to local public health guidance.

MKTG5211I [0.25 credit]

Technology Marketing   Marketing in technology-intensive environments, with focus on business buying processes. Buyer behaviour, competitive and environmental analysis, planning and implementation of product and service innovations, targeting and positioning in the early stages of introduction, management through the growth stages, tracking success and contingency planning.

Course Description

The marketing of high-technology products is characterized by innovation in fast paced and highly competitive environments. The ultimate success of these technologies and the organizations that produce them depend on a keen understanding of market opportunity and readiness, pragmatic decision-making on limited and evolving information, and the effective management of product portfolios.

This course examines marketing from the perspective of high technology products and services. It covers this topic with an emphasis on the importance of understanding what it is to be market oriented, and the necessary considerations in effective portfolio management. This includes a close examination of the adoption lifecycle, it's impact on product portfolios decisions, and the supporting role of ecosystems in developing winning strategies. This course will provide you with a technology specific perspective of marketing strategy, and what it means when formulating actionable marketing mix decisions.

Course Learning Objectives:

At the conclusion of this course, students should be able to do the following:

1. To understand the role of marketing in technology organizations and industry context. You should leave this course with a solid grasp of the role of tech marketing and how and why strategic marketing planning helps these organizations deliver superior value to customers and superior returns to stakeholders.

2. To know and be able to apply relevant marketing concepts in technology organizations. You should leave this course with a working understanding of specific concepts that are critical to technology marketing (e.g., market orientation, technology adoption, collaboration, ecosystems).

3. To be comfortable with the process of making sound strategic marketing decisions. Building on MKTG5200 Marketing Strategy, you should leave this course with the ability to analyze a technology 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 elements of a tech organization's marketing mix: i.e., product and portfolio roadmaps, technology services, ecosystems and channels).

Course Prerequisite MKTG5200, course equivalent or faculty permission.

Required Text and Other Readings

Texbook(s): Marketing of High-Technology Products and Innovations, 3/E
Jakki J Mohr, Sanjit Sengupta, Stanley Slater / ISBN-10: 0136049966, ISBN-13: 9780136049968

Recommended: Crossing the Chasm, 3rd Edition: Marketing and Selling Disruptive Products to Mainstream Customers Paperback Jan. 28, 2014. ISBN-10: 0062292986 ISBN-13: 978-0062353948

Cases and Journal Articles: Our case studies for this semester will be draw from the HBR and Ivey collections. Cases may be procured directly from Ivey Publishing (https://www.iveycases.com/) or Harvard Business Publishing (http://hbr.org/case-studies).

Do not purchase cases in advance of them being confirmed either in the syllabus (below) or in class/on Brightspace.

Drop Course Policy

The deadline for academic withdrawal is the last day of classes (each term).

Grading Scheme

Individual Assignment – Case Analysis	25%
Individual Assignment – Newsbytes (3)	15%
Group Project	35%
Group Project Presentation (deck and delivery)	10%
Contribution to Class Discussion	15%
TOTAL	**100%**

Requirements for each deliverable will be posted on Brightspace and discussed in class.

While group discussion is encouraged for many aspects of this course, the individual assignments are individual deliverables to be completed on your own. Group discussion or any collaboration are not permitted on these assignments.

Criteria for Evaluation and Grading

Submissions: For this seminar, all submissions are electronic, in PDF form, submitted on Brightspace by stated deadlines.

Grading: Each component of a student's grade will be assigned a letter grade score. A student's final course grade will be a weighted average of each of these components.

Late Penalties: For any assignment and report, late penalties will be decided at the professor's discretion. For the take home exam, no late submission will be accepted without medical certification.

If you are unable to attend class on the day an assignment is due, it is your responsibility to ensure that you have submitted your assignment on Brightspace prior to the deadline. Submissions sent via e-mail will not be accepted. To ensure fairness for all students, penalties will be applied to late assignments: Failure to submit an assignment on time will result in a penalty of five (5) percentage points per day late as determined by the timestamp of your Brightspace submission. 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, 70% if submitted the following day, and so on.

Semester Deliverables

Individual Assignment – Written Case Analysis

Individual assignments will be assigned during the semester. This will include a written case analysis. Your task is to prepare a consultant's report for the company. Details of the evaluation criteria for each case analysis will be provided on Brightspace and discussed in class at the beginning of the semester.

Individual Assignment – Newsbytes

During the semester, each student will be expected to submit brief write-ups on technology marketing issues in the news, in the form of "newsbytes." These newsbytes provide a valuable opportunity to identify and examine marketing issues in current events.

Each student will be required to submit **3 newsbytes during the semester**. Starting week 2 of the semester, there will be 5 weeks designated as newsbyte weeks, and it will be the choice of the student which 3 weeks to submit a single newsbyte. Newsbyte submissions will not be accepted outside of these weeks.

Students can submit a maximum of 1 newsbyte on a given week.

What are Newsbytes?: Students will be required to find a recent article or story (must be less than 3 months old) related to marketing in a newspaper, business magazine or marketing-related websites and produce a 1 – 2 page summary that illustrates a topic of interest in the course. For newsbyte submission weeks, all submissions are due on Brightspace before the start of each class, and each week several students may be asked to present their article.

Newsbyte Template: The newsbyte guidelines and template will be posted on Brightspace.

- All submitted newsbytes must use the template as provided on Brightspace
- On Brightspace, all newsbytes must be submitted as PDFs
- No hard copy submission required

Marking Newsbytes: Newsbytes are marked as Pass Exemplary (PE)/Pass (P)/Fail (F). Newsbytes that consistently demonstrate higher quality and depth of thought in the write-up will be reflected accordingly in the final course mark.

- Newsbytes **that do not follow the template** provided will not be marked or counted as one of your three (3) submissions for the semester.

- Newsbytes must be based on **articles less than three months old**. Newsbytes based on articles that do not meet this requirement will not be marked or counted as one of your three (3) submissions for the semester.

- Newbytes submitted that are **missing any of the sections outlined** in the guidelines and template on Brigthspace will receive a **failing grade**.

- **Newsbyte Failing Grade –** In the case of a failed newsbyte, you will have the option to submit a replacement newsbyte if you have open newbyte weeks remaining in the 5 weeks.

Presenting Newsbytes: Newsbytes are intended to stimulate class participation, and if presenting, you will receive an email from me prior to class asking you to prepare a brief presentation. Guidance will be provided on where to focus your presentation.

Group Technology Marketing Strategy Project - Proposal

Working in a group of three to five, you will identify a client organization facing a technology marketing problem/opportunity (both the client and the problem/opportunity must be approved by the professor). You will then prepare a 1-page 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.

All projects must be approved by the professor before undertaking as the group project.

Eligibility of Firms for Project

- It is the group's responsibility to ensure that there is sufficient information to complete all the required analyses for the capstone report. Particular attention should be given to ensuring the availability of market information, competitor information and/or industry data for various metrics (a sufficient number of publicly listed and comparable firms) to perform industry analyses.
- Selecting a firm of interest to the group is encouraged.
- The entire firm should be analyzed as it relates to the marketing problem being examined (e.g., multinational firms should be avoided).
- Firms researched in other classes **are not eligible**. Students are reminded it is a violation of academic plagiarism policy to submit substantially the same analysis used for multiple courses.
- ***Please note that the information above may be subject to revision and/or additional requirements may apply.***

Group Technology Marketing Strategy Project

Working from your proposal, your group will 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.

Further Information for Client Organizational Studies

There are significant research resources available to students at Carleton. Students are encouraged to become familiar with the various databases available through the library as well

as financial tools such as Bloomberg and Datastream (a tutorial will be offered during class). See this course's library page at https://library.carleton.ca/research/course-guides/mktg-5200.

Students are also expected to read recent business articles concerning the selected firm, its competitors and the industries within which it operates, as well as articles on the macro business environment (i.e., markets, technology, economic trends). <u>All assignments, the presentation and final report MUST include supporting metrics and data</u>.

Company/Firm Selection Policy:

When students choose a client organization to study, it is the students' responsibility to undertake the research necessary to determine if sufficient information is available. The selection of a business firm is an assurance by the students to the professor, that there is sufficient information available to complete the assignments and strategic analysis.

<u>Authorization by the professor</u> is to ensure that groups do not choose a clearly ineligible firm. Should it subsequently become apparent that there is insufficient information to adequately complete the assignment, it is the students' responsibility to change firms and obtain authorization of the new firm. The students may change the selection of the business firm at any time but must receive the necessary approval. **Note: Authorization by the professor is not a guarantee that there is sufficient information.**

Each student is responsible for selecting his/her partners and the business firm to be analyzed, having ensured the adequacy of information available to complete the required comprehensive strategic analysis.

Each group is required to hand in a list of group members, the name of the company chosen, and a list of potential data sources for the research project. A form will be provided on Brightspace for the group, project and sources. Deadlines are highlighted on the syllabus.

Group Project Presentations.

Presentation 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.

Policy for Group Presentations: Student attendance on presentation weeks is mandatory.

All group members must participate in their team presentations. Any student unable to do so because of illness or other circumstances beyond their control must contact the professor via email prior to the start of the class for which the presentation is scheduled. The professor may allow an alternative individual assignment when the absence is supported by a medical certificate and or appropriate document(s) to support the reason for the inability to be present. Any student missing the presentation would not obtain any grades for that portion of the group work. The other group members must make the entire presentation as scheduled.

Group Project: Forming Groups

Students will be required to form groups this semester for the group project. Depending on class size, groups will include 3 to 5 students. Ex*ceptions* may be permitted whereby for instance, a student without a group may be assigned to a group or a student may be asked to switch groups, all at the professor's discretion. These groups will collectively carryout group assignments with the major deliverable being the final group report.

Students are responsible for selecting their group partners and the group is expected to *self-govern* to ensure the quality of all deliverables, independently resolving any conflicts within the group. It is strongly recommended that students seek diversified and complementary skill sets in their prospective group partners, ideally students from different academic concentrations with varied work experiences and backgrounds. Further information on effective group formation and processes will be discussed at the first class.

The group assignments provide students with opportunities to develop and enhance interpersonal, communication, leadership, follower-ship and other group skills. The resources at http://sprott.carleton.co/wp-content/files/Group-Work-Resources.pdf are recommended.

Students are particularly encouraged to maintain evidence of their contribution to the group performance, including estimated research time, working papers, etc. The keeping of a group log of meetings, commitments, decisions, etc. is also a valuable organizational tool. It is in each group member's best interest to ensure an equitable sharing of the research and work.

Peer Evaluation - A peer evaluation for the final project report will be required from all students and will be taken very seriously in assigning grades. For instance, up to 5% may be deducted from a student's final grade on the assignment if he or she received a poor peer evaluation from the majority of members in the group.

Contribution to Class Discussion

Students are encouraged to actively participate in all classes by being adequately prepared (i.e., having attentively read and reflected on the text chapters and any other assigned readings/ cases). In a seminar course regular attendance, participation and contribution from all class members is expected and essential for effective discussion. It is student contribution to peer learning that constitutes a contribution, including encouraging colleagues, building on earlier comments without repeating, listening attentively to speakers and being respectful of differences of opinion.

While attendance is a pre-requisite to participation, it is the quality, not the quantity, of remarks that earns the grades. Meaningful contribution requires that you teach your peers something useful that might otherwise have gone unnoticed. A discrete use of electronic devices for notetaking is permitted, however no distractions will be tolerated.

It is also recognized that on some days there may be insufficient time for me to call upon each student who wishes to speak. Any such demonstration of desire to participate will also be considered in the overall assessment of class contribution.

In addition, students may be asked at time to form groups to discuss cases in class. Class discussions will include a combination of case study, current events, presentation of individual work and group project learnings. For example, a group may be asked to present a short summation of the case situation, provide the highlights of their analysis using a particular framework, debate from the perspective of various stakeholders, etc. Also, to provide an opportunity to more closely interact with other classmates, students may be assigned to case discussion groups which will vary from class to class.

Video Recording of Presentations:

As part of the Assurance of Learning process of AACSB accreditation, the School may periodically evaluate, among other things, presentation skills. Accordingly, student group presentations may be recorded to provide material for such assessment; however, this has no impact at all on the course grade.

Missed Course Deliverables

Late Assignments:
To ensure fairness for all students, penalties will be applied to late assignments. Any penalties applied remain at the discretion of the professor. Failure to submit an assignment on time will result in an initial penalty of five (5) percentage points per day. 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, 70% if submitted the following day, etc.

Missed Assignments and Deferred Examination:
In cases where students are not able to meet a course requirement (i.e., contribute to a group project, submit an individual assignment, or write the midterm case) due to a certified illness, these situations will be addressed following university guidelines. In all such cases, students will be required to provide an official medical certificate/documentation at least two weeks before the end of the semester.

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.

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

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

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:
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**
  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 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/

Additional Guidance on Citations/Bibliography:

Bibliography:

It is important that you follow a recognized style to present a comprehensive bibliography that ensures an integrated alphabetical order and recognizes multiple citations to same year documents from a common source.

Be consistent when ordering your citation sources so that like items are grouped together. For example, Natural Resources Canada may also be referred to as NRC (both of which are acceptable), however in ordering citations from multiple NRC documents select one format and list consecutively by date (from oldest to most recent).

Guidance provided by the Academy of Management in its Style Guide may be found at: http://aom.org/uploadedFiles/Publications/AMR/AMRstyleguide.pdf (disregard the *in-text, in-parenthesis* identification, as the required use of footnotes replaces this format).

Footnotes: Every source for citations, statistics, tables, etc. should be sequentially referenced to a footnote at the bottom of the page. Full information should be provided to allow a reader to know exactly where you obtained the data, remembering that direct quotations require the specifics of page number. When a subsequent citation is made to the exact same one that proceeds you may identify it as *ibid* (for more details see

https://www-chicagomanualofstyle-org.proxy.library.carleton.ca/home.html

Example of Declaration of Academic Integrity

MKTG5211I – Technology Marketing
Summer 2022

_____Draft/ __x__Final Report   on Company: _____

The University Senate defines plagiarism in the regulations on instructional offenses as: "to use and pass off as one's own idea or product work of another without expressly giving credit to another."

I/we declare that the work submitted herewith is my/our work. All sources have been referenced in the footnotes and listed in the bibliography. This work has not been shared with anyone outside this group. This work is the intellectual property of each of the group members and will be returned to any one of the group members to be shared with the other group members.

Student Number	Student Name	Signature of Student (Everyone must sign to receive a grade)

Date Submitted: _____

Instructional offence cases must be communicated to the Associate Dean, MBA programs, who then refers the allegation to the Associate Dean, Faculty of Graduate and Postdoctoral Affairs; individual solutions are not permitted.

MKTG5211 (SUMMER 2022)
TECHNOLOGY MARKETING
<u>**CLASS SCHEDULE – SECTION I**</u>

2021/2022 dates and deadlines: https://calendar.carleton.ca/academicyear/

Week	Date	Topics	Due
1	Jul 6	Course Overview Marketing Recap and the Tech Context	*Submit:* *Groups and Member Names*
2	Jul 13	Marketing Orientation in High-Tech	*Submit: Group Study Proposals* *Newsbyte Week 1*
3	Jul 20	Technology Customers and Markets	*Newsbyte Week 2*
4	Jul 27	Product and Portfolio Roadmaps	*Submit: Individual Assignment Case* *Newsbyte Week 3*
5	Aug 3	Tech Ecosystems, Alliances and Channels	*Newsbyte Week 4*
6	Aug 10	Group Project Presentations Course Wrap-Up	*Submit: Group Presentation* *Newsbyte Week 5*
	Aug 19	Exam Week – No Classes (Aug 19-25)	*Submit: Group Projects*

* <u>*Speakers, Schedule and Readings*</u>:

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.