

MKTG 5200 P (PMBA)
Marketing Strategy - Winter 2023
Classroom: NI 3040

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Office Hours: by appointment

Learning Modality: In total, attending class for this course will require the following approximate time commitment (excluding readings and assignments):

- 10 hours online, asynchronous (*i.e., recorded content*)
- 26 hours in-person

This course will be delivered over two weekends: **January 6/7** and **February 3/4, 2023**.

Course Calendar Description:

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. 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 (financial or otherwise) to stakeholders. The marketing plan consists of market segmentation, targeting, and positioning choices, grounded in a solid understanding of customers, competitors and the organization's own strengths and weaknesses. These insights form the basis for tactical—i.e., marketing mix—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:

After successfully completing this course, you will be able to:

1. Explain what marketing is and how it creates benefits for companies, customers, and society.
2. Assess the situation facing the firm using SWOT and PEST analysis.
3. Define and apply key marketing concepts, including segmentation, targeting, value proposition, differentiation, and positioning.
4. Choose an optimal target market.
5. Develop a differentiated offering that creates value for the target market and position it appropriately.
6. Make tactical decisions related to branding, product, price, distribution, and promotion.
7. Create a complete marketing plan that includes consideration of risks and forecasts of market share, sales, and profitability.

Course Prerequisites: None

Required Materials:

There is no mandatory textbook in this course. However, you will find a reference book to be useful when seeking to deepen your understanding of key topics and terminology. Here are two that do a good job of covering key topics succinctly:

1. *A Framework for Marketing Management*, by Philip Kotler and Kevin Lane Keller
ISBN: 0133871568 (6th edition); 0132539306 (5th edition); 0131213458 (1st Canadian edition)
2. *MM4*, by Dawn Iacobucci
ISBN: 1133629385 (4th edition)

If cost is a concern, an Open Educational Resource (free access) textbook, *Principles of Marketing*, is available free of charge on our Brightspace course page. This book is easy to navigate and does a good job of covering basic marketing concepts. However, because it is no longer being revised by the authors, some examples are dated and there is limited coverage of digital marketing, social media, and marketing analytics.

For your convenience, the schedule in this course outline identifies specific chapters from each of these books that correspond to the topics we will cover in class.

Recorded Lectures

The compressed nature of the PMBA format makes it impractical to provide in-depth coverage of all relevant concepts during our scheduled class time. Consequently, the course includes a collection of recorded lectures that are available for viewing in Brightspace. These lectures vary in length from 5 to 30 minutes—each focused on a specific topic. Combined with the textbook, these will provide you with a sound conceptual foundation for the course.

Managerial Readings and Case Studies:

To ensure that you leave this course with a sophisticated understanding of marketing, I have curated a selection of readings from the *Harvard Business Review* and other similar publications. These are written for senior managers and are intended to challenge your preconceptions and stimulate your thinking.

We will also use a series of case studies, giving you an opportunity to apply concepts learned in this course to real-world marketing problems. These cases form the basis for many of the assignments you will complete as part of the course deliverables.

Authorized access to these and other copyright-protected course materials is provided via a licensing agreement between Carleton University and Harvard Business Publishing. Where possible, links to access these materials are provided within Brightspace. Other relevant materials may also be made available to you, where appropriate.

Final Exam Date: There is no exam in this course.

Drop Course Policy: The deadline for academic withdrawal is the last day of class (February 4, 2023).

Grading Scheme:

Marketing Thought Paper	10%
Group Response to Case Questions	15% <i>group assignment</i>
Personal Application Assignment	20%
In-Class Case Presentation	10% <i>group assignment</i>
Case Presentation Peer Critique / Rebuttal	5% <i>group assignment</i>
Contribution to Class Discussion	15%
Final Exam (Case Analysis)	25%
TOTAL	100%

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:

- **Marketing Thought Paper:** The marketing thought paper, due immediately prior to our first class, will lay a foundation for the course by getting you to reflect on what marketing is, and how effective marketing has helped specific organizations (companies, non-profits, government agencies, etc.) to succeed. You are free (but not required) to draw on your own personal experience and may discuss as few or as many organizations as you wish within the 1,250 word (approximately 5-page) limit.
- **Group Response to Case Questions:** I will be distributing several brief cases in class, which we will discuss as a class. Prior to each of these discussions, you will have 45-60 minutes to read the case and analyze it as part of a small group (approximately 4 students). The first of these cases will be accompanied by a set of questions; your group will need to prepare a concise set of responses and submit them online before the class reconvenes.
- **Personal Application Assignment:** Following the first weekend of class, I will ask you to reflect on insights learned from the various readings, class discussion, and in-class exercises, and prepare a written report summarizing key takeaways and their relevance to you. This document should (a)

provide evidence of knowledge gained, and (b) show how you plan to apply it in your own job or, if you prefer, how your organization might apply these concepts and insights to enhance its overall effectiveness. This assignment has a maximum length of 2,500 words (approximately 10 pages).

- **In-Class Case Presentation:** For the remainder of the brief cases, groups will be asked to prepare PowerPoint presentations. These should (a) size up the key problems / opportunities facing the organization, (b) identify and evaluate strategic alternatives, and (c) propose a specific course of action for the decision-maker. Using a random draw, your group will be chosen to present its analysis and solution to one of these cases.
- **Case Presentation Peer Critique / Rebuttal:** Using a random draw, your group will also be chosen to critique and/or provide specific rebuttal to another group's case presentation. Aim to identify strengths and areas for improvement and prepare challenging questions for the presenters.
- **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 (for additional guidance, refer to my comments below on preparation and participation). Your goal should be to make comments that facilitate the learning of your peers.
- **Final Exam (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 two weeks to read the case and prepare your recommendations in 2,500 words or less (plus appendices).

Instructions for Submitting Written Assignments:

The Marketing Thought Paper is due at the beginning of class (i.e., 8:30 a.m. sharp) on Friday, January 6. The Personal Application Assignment is due at the beginning of class on Friday, February 3. Please upload an electronic version to Brightspace and be sure to retain a copy of all work submitted.

Late Assignments:

If you are late for 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.

Preparation and Participation:

Given the compressed nature of the PMBA program, I expect that you will be present for all of the topics covered in this course. If you are unable to attend class for any reason, please let me know as soon as possible, as limited accommodation may be possible. Missing a full day of class (or an equivalent amount of time) will compromise your learning experience and make assessment difficult; in such cases, it is generally advisable to withdraw and retake the course at a later date.

Regular contribution from all class members is essential for effective discussion and learning. 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 a 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. 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/themselves) 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.

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

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

Important Dates & Deadlines: Winter Term 2023

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

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).

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 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 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 and Carleton ID number. 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

Covid-19 Information:

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.

COURSE SCHEDULE

Please see the course page on Brightspace for additional detail

DAY 1: Friday, January 6, 2023

 **ASSIGNMENT DUE:** *Marketing Thought Paper* (submitted via Brightspace) by 8:30 a.m.

	Topics	Corresponding Chapters
Morning	<ul style="list-style-type: none">• Strategic role of marketing• Developing marketing plans	Kotler & Keller: Ch.1, Ch.2 Iacobucci: Ch.1 Principles: Ch. 1, Ch.2, Ch.15
Midday	<ul style="list-style-type: none">• Making sense of the marketing environment	Kotler & Keller: Ch.3 Iacobucci: Ch.2, Ch.15 Principles: Ch.10
Afternoon	<ul style="list-style-type: none">• Understanding customers• Identifying market segments & targets	Kotler & Keller: Ch.5, Ch.6, Ch.7 Iacobucci: Ch.3, Ch.4 Principles: Ch.3, Ch.4, Ch.5

DAY 2: Saturday, January 7, 2023

	Topics	Corresponding Chapters
Morning	<ul style="list-style-type: none">• Creating value and building customer relationships	Kotler & Keller: Ch.4 Iacobucci: Ch.14 Principles: Ch.6, Ch.14
Midday	<ul style="list-style-type: none">• Differentiation and brand positioning• Dealing with competitors	Kotler & Keller: Ch.9 Iacobucci: Ch.6 Principles: Ch.5, Ch.6
Afternoon	<ul style="list-style-type: none">• Building brand equity	Kotler & Keller: Ch.8 Iacobucci: Ch.7 Principles: Ch.6

 **IN-CLASS ASSIGNMENT:** *Response to Case Questions* (completed/submitted during class time)

DAY 3: Friday, February 3, 2023

 **ASSIGNMENT DUE:** *Personal Application Assignment* (submitted by 8:30 a.m.)

	Topics	Corresponding Chapters
Morning	<ul style="list-style-type: none">• Setting product strategy• Introducing new market offerings	Kotler & Keller: Ch.10 Iacobucci: Ch.8 Principles: Ch.6, Ch.7
Midday	<ul style="list-style-type: none">• Choosing distribution channels and managing logistics	Kotler & Keller: Ch.13 Iacobucci: Ch.10 Principles: Ch.8, Ch.9
Afternoon	<ul style="list-style-type: none">• Retailing and retail strategy	Kotler & Keller: Ch.14 Iacobucci: Ch.10 Principles: Ch.8

DAY 4: Saturday, February 4, 2023

	Topics	Corresponding Chapters
Morning	<ul style="list-style-type: none">• Setting price and managing pricing strategy	Kotler & Keller: Ch.12 Iacobucci: Ch.9 Principles: Ch.15
Midday	<ul style="list-style-type: none">• Designing advertising messages and managing marketing communications	Kotler & Keller: Ch.15, Ch.16 Iacobucci: Ch.11, Ch.12 Principles: Ch.11
Afternoon	<ul style="list-style-type: none">• Managing digital and social media, sponsorship, and influencer marketing	Kotler & Keller: Ch.17 Iacobucci: Ch.13 Principles: Ch.12

 **IN-CLASS ASSIGNMENT:** *In-Class Case Presentation* (completed/submitted during class time)

 **IN-CLASS ASSIGNMENT:** *Case Presentation Critique* (completed/submitted during class time)

Sunday, February 19, 2023

 **ASSIGNMENT DUE:** *Take-home Final Exam* (submitted by 11:59 p.m.)