**PROVISIONAL SYLLABUS**

**Marketing Strategy Consultancy - Spring 2015**

**MKTG 3250-001; CRN # 24430**

**Belk College of Business, UNC-Charlotte**

**Instructor:** Mrs. Tamara L. Cohen e-mail: tcohen3@uncc@edu

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 **Time Place**

**Class**  Mon. & Wed. 8:00 – 9:15 am Lecture Hall 106, Friday Building

**Office** Mondays 11:00 am – 12 noon 352-B (3rd floor) Friday Building

or by appointment \_\_\_ 0

**Course Description**

Integration of all marketing elements in a strategic planning framework. Emphasis on areas of strategic importance, especially those which have significant implications and relevance for marketing policy decisions in competitive situations. Students will be involved in addressing a marketing strategy issue in a consultancy capacity with an actual client.

**Course Objectives**

As the capstone course for Marketing majors, the primary goals of this course are:

* preparation for thinking strategically as a marketing professional, and
* developing the ability to write an effective marketing plan.

**Course Prerequisites**

ALL of the following:

* + - * MKTG 3110 (Marketing Concepts) with a grade of “C” or better
			* Completion of at least three marketing elective courses (MKTG 32XX courses)
			* Senior standing
			* Marketing major

**Course Methodology**

As the capstone course, Marketing Strategy Consultancy has been developed to present a real-world opportunity to demonstrate the students marketing capabilities and potential as marketing professionals. Working in teams of 5-6 students, independently of other teams, each student will be responsible for contributing to the development of an actual marketing plan for a real client with a real marketing issue.

Included in the course:

1. Limited class discussion of topics, questions, and strategic issues
2. Oral and written presentations of each segment of the project – usually weekly
3. Development of a Marketing Plan for the client
4. Oral presentation of integrated Marketing Plan to faculty and to the actual client
5. All students may be asked to sign a Non-Disclosure Agreement to preserve client confidentiality

There are 7 major elements of the Marketing Plan, corresponding to 7 regular “Team presentation” assignments, each lasting 15 minutes. (Due dates are in COURSE OUTLINE, below.) Teams will be assigned the same regular time for these presentations in each relevant week. The times for “Team presentation #8” and presentations to faculty judges will be assigned separately. Students must remain available for all designated class time.

**Textbook**

Strategy is a creative and individual part of marketing. There are many different ways to develop marketing strategies, but there are common elements to marketing plans. Any of the following books present worthwhile approaches. It is recommended that each team uses at least one of these references.

1. Aaker, David A. ***Strategic Marketing Management***, 9th edition (New York: John Wiley & Sons, 2011)
2. Best, Roger J. ***Market-Based Management: Strategies for Growing Customer Value and Profitability***, 6th edition (Boston: Pearson Education, 2013)
3. Cravens, David and Nigel Piercy, ***Strategic Marketing***, 10th edition (Burr Ridge, IL: McGraw-Hill, 2012)
4. Ferrell, O.C. and Michael D. Hartline, ***Marketing Strategy***, 6th edition (Mason, OH: SOUTH-WESTERN CENGAGE Learning, 2014)
5. Hill, Mark E. ***Marketing Strategy: The Thinking Involved*** (Thousand Oaks, CA: Sage Publishing, 2013)
6. Kerin, Roger A. and Robet A. Peterson, ***Strategic Marketing Problems***, 13th edition (Boston: Pearson Education, 2013)
7. Mooradian, Todd A., Kurt Matzler, Lawrence J. Ring ***Strategic Marketing*** (Boston: Prentice Hall, 2012)
8. Walker, Orville C. and John W. Mullins, ***Marketing Strategy: A Decision-Focused Approach***, 8th edition (Burr Ridge, IL: McGraw-Hill, 2013)

**Attendance**

Attendance is mandatory for the first and third classes of the semester. Missing either of these classes will mean exclusion from the course. Regular class attendance is expected as work is required for nearly every class. Realistically, there may be an occasion when you are unable to attend class. If you are responsible for presenting information to the class that day, other arrangements can be made if proper advance notice is given to the instructor and to your team. Class participation will be used in determining grades. Any student missing more than two classes will be subject to an unsatisfactory grade.

**Assignments**

Assignments comprise submission of different elements of the Marketing Plan. Each student is responsible for the team’s submission being professional in appearance, grammar, spelling and punctuation. Student teams will present various aspects of the plan to the instructor throughout the course. At the end of the semester, all teams will present to a panel of faculty judges in a competition that simulates the marketing consulting environment. The teams that make it through the first round will then present their Marketing Plans to representatives of the client. The top two teams from both sections of the course will be invited to the client’s offices to present their Marketing Plans, providing the client believes the work is of sufficient quality. No late work is acceptable at any stage of the process.

**Written Assignments**

1. All written assignments are due on the dates assigned. They must be typed, double-spaced and professional in appearance.
2. Identify all assignments with a cover page that contains the team number and the students’ names in alphabetical order.
3. Always include an Executive Summary at the beginning of your assignment. This should never be longer than one page, and should be the only section on that first page.
4. Graded assignments will be returned to teams each week. All graded work must be returned to the instructor with the Final Marketing Plan, i.e. on April 20.
5. Interim communications from the instructor will be transmitted via email.
6. For the faculty judging the competition, staple PowerPoint pages in the upper left corner; no folders, please. The number of PowerPoint copies will be specified in April, based on the number of faculty judges participating in the competition.
7. The Marketing Plan copy for the client should be submitted with as professional appearance as your team can create.
8. The instructor will keep all work, so if students want copies, the paper should be duplicated before submission. Papers with multiple typos or grammatical errors will be returned ungraded, except for the final paper. (A penalty of 5 points per error will be assessed).
9. One complete copy of each team’s Marketing Plan and one copy of the final PowerPoint presentation are to be submitted to the instructor. Additional copies will be specified based on the number of client representatives participating in the competition.
10. The final project of the top 6 teams in the class will be orally presented in randomly assigned time slots to the faculty for selection of the Final Four teams to present to the client. All teams’ written Plans will be given to the client. The four selected teams will present to representatives of the client on campus. The client will select up to two finalist teams to travel to the client’s location for the final presentation and selection of the winning team.

**Oral Assignments**

Students will present each element of their Marketing Plan, as specified in the Course Outline. Maximum time limits will be provided and must be strictly observed (as is common in ‘real’ marketing presentations).

All team members are expected to participate in oral presentations.

**Peer Evaluations**

All team work will involve peer and self-evaluation of each student’s contribution to the team’s work. Team work is an important part of the learning experience as well as being an important part of work as a marketing professional. Each student is expected to report fairly on the work of the members of the team.

There will be a midterm peer evaluation and an evaluation at the end of the project.

Your peer evaluations must be fair representations of each member’s contribution. It is a violation of academic integrity to decide among the members of the team, as to point allocations. Base your individual evaluation on the contribution of each team member as fairly as possible.

**Exam**

The final exam is solely based on the Marketing Plan, which is developed as team work. However the exam will be independent work as it is used by the Belk College as the assessment of each student’s individual ability to write an effective marketing plan.

**Team Mechanics**

* Each team should keep records of its meetings that include: day, date, and time of the agreed meeting, who attended, what was covered, and next assignments. A folder will be provided to each team for this purpose.
* A team may fire a member of the team with documentation of just cause. The fired individual will have to find his/her own credible marketing consulting project, and prepare a complete marketing plan on his/her own. Just causes include: missing team meetings without prior notification, missing team meetings for trivial reasons, failure to deliver work in a timely manner, passively accepting the team’s ideas with little or no input that moves the team toward accomplishing its goals, submitting work that is of poor quality necessitating others to re-do the work, and not following team rules.
* The instructor may ask to see teams’ records periodically.

**Grading**

 Situational Analysis - Internal Status & Customer Analysis 5.0

Situational Analysis - External Environment & Competitive Analysis 5.0

S.W.O.T. Analysis 5.0

Target Market, Goals, Objectives 5.0

Marketing Strategy & Tactics 5.0

Marketing Tactics & Timelines 5.0

Financial Implications & Controls 5.0

Marketing Plan Presentation (final) 5.0

Marketing Plan (report) 30.0

Final Exam 30.0

 **TOTAL 100.0**

Bonus points: Final Four 5.0

 Final 7.5

 **MAXIMUM 112.5**

A = Superior performance Full understanding of all material with superior ability to

 90.0 – 100.0 points integrate and apply knowledge.

B = Good performance Excellent understanding and good ability to apply material.

 80.0 – 89.9 points

C = Average performance Superficial understanding of most material and some ability

 70.0 – 79.9 points apply most material.

D = Passing performance Incomplete understanding of material; limited ability to apply

 60.0 – 69.9 points material; inadequate participation in class/team discussions.

F = Failure to perform Lack of understanding of material; little ability to apply

 below 60.0 points material. Lack of timely submission, excessive absences,

 unsatisfactory performance in team work.

**PROVISIONAL COURSE OUTLINE - MKTG 3250-001 - Spring 2015**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **day** | **date** | **topic** | **assignment** | **hand in** |
| 1 | Wed. | Jan.7 | Intro. & Overview of a Mktg Plan **MANDATORY ATTEND.** | Student Info. Sheet | Student Info. Sheet |
| 2 | Mon. | Jan.12 | TEAM meetings  | Finalize project teams & logistics | team membership |
| 3 | Wed. | Jan.14 | Project Presentation by client **MANDATORY ATTEND.** |   | - |
|  | Mon. | Jan.19 |  **MARTIN LUTHER KING DAY - NO CLASS** |
| 4 | Wed. | Jan.21 | Team presentation #1 **(15 minutes)** | Situational Analysis - Internal Status & Customer Analysis | write-up & slides #1 |
| 5 | Mon. | Jan.26 |
| 6 | Wed. | Jan.28 | CLASS meets | Review Situational Analysis | - |
| 7 | Mon. | Feb.2 | Team presentation #2 **(15 minutes)** | Situational Analysis - External Environment (excluding competition) | write-up & slides #2 |
| 8 | Wed. | Feb.4 |
| 9 | Mon. | Feb.9 | Team presentation #3 **(15 minutes)** | Competitive Analysis & S.W.O.T. Analysis | write-up & slides #3 |
| 10 | Wed. | Feb.11 |
| 11 | Mon. | Feb.16 | CLASS meets - optional | Project Review  | - |
| 12 | Wed. | Feb.18 | Team presentation #4 **(15 minutes)** | Target Market, Goals, Objectives | write-up & slides #4 |
| 13 | Mon. | Feb.23 |
| 14 | Wed. | Feb.25 | CLASS meets - optional | Project Review  | - |
|  |   | Mar.2-4 |  **SPRING BREAK** |
| 15 | Mon. | Mar.9 | Team presentation #5 **(15 minutes)** | Marketing Strategy & Tactics | write-up & slides #5 |
| 16 | Wed. | Mar.11 |
| 17 | Mon. | Mar.16 | Team presentation #6 **(15 minutes)** | Marketing Tactics & Timelines | write-up & slides #6 |
| 18 | Wed. | Mar.18 |
| 19 | Mon. | Mar.23 | Team presentation #7 **(15 minutes)** | Financial Implications & Controls | write-up & slides #7 |
| 20 | Wed. | Mar.25 |
| 21 | Mon. | Mar.30 | TEAM work | Optional consultation by appointment | - |
| 22 | Wed. | Apr.1 | Team presentation #8 Final team practice**(30 minutes)** | Marketing Plan | write-up & slides #8 |
| 23 | Mon. | Apr.6 |
| 24 | Wed. | Apr.8 |
| 25 | Mon. | Apr.13 | Half Top 6 teams present to faculty judges 7:30-9:30 am | Marketing Plan | Provide copies of slides for faculty judges (# of copies t.b.d.) |
| 26 | Wed. | Apr.15 | Half Top 6 teams present to faculty judges 7:30-9:30 am |
| 27 | Mon | Apr. 20 | Final Four teams present to client | Final Marketing Plan & Slides due by 8:00 am |
| 28 | Mon. | Apr. 27 | Final 2 teams present at client HQ |   |
| 29 | Wed. | May 4 | Final Exam: Marketing Plan Key Components | **8:00 – 10:30 am**  |

**UNIVERSITY POLICIES & CLASSROOM EXPECTATIONS**

**Academic integrity:** All UNCC students have the responsibility to be familiar with and to observe the requirements of The UNCC Code of Student Academic Integrity. Imprint these on your brain.

*This code forbids cheating, fabrication or falsification of information, multiple submissions of academic work, plagiarism, abuse of academic materials, and complicity in academic dishonesty. Any special requirements or permission regarding academic integrity in this course will be stated by the instructor, and are binding on the students. Academic evaluations in this course include a judgment that the student's work is free from academic dishonesty of any type, and grades in this course therefore should be and will be adversely affected by academic dishonesty. Students who violate the code can be expelled from UNCC. The normal penalty for a first offense is zero credit on the work involving dishonesty and further substantial reduction of the course grade. In almost all cases the course grade is reduced to F. Standards of academic integrity will be enforced in this course. Students are expected to report cases of academic dishonesty to the course instructor.*

<http://www.legal.uncc.edu/policies/ps-105.html>

**Statement on Diversity:** *The Belk College of Business strives to create an inclusive academic climate in which the dignity of all individuals is respected and maintained. Therefore, we celebrate diversity that includes, but is not limited to ability/disability, age, culture, ethnicity, gender, language, race, religion, sexual orientation, and socio-economic status.*

**Classroom Policies:**

1. If a student arrives late for his/her team’s presentation on any particular day, s/he may not participate and will be counted as absent. No marketers would be late to a presentation (or they would not have jobs for long).
2. The use of cell phones and other communication devices is disruptive, and is therefore prohibited during presentations.
3. Copies of materials that are needed for any discussion/presentation should be made prior to class.
4. All graded materials must be returned at the end of the semester, i.e. with materials handed in with each team’s Final Marketing Plan (on April 20).