**MARKETING STRATEGY CONSULTANCY**  
MKTG 3250-001  Fall Semester 2015  CRN 14246  
Monday/Wednesday 9:30-10:45 pm Friday Building Rm 123

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**Instructor:** Dr. L. Swayne, Professor  
Department of Marketing  
Office: Friday Room 240B, UNC Charlotte Campus  
Office Hours: Monday 12:30 - 2:30 pm campus  
Monday 5:00 - 5:30 pm Center City  
by appointment  

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**Phone:** (704) 687-7602  
**Fax:** (704) 687-6442  
**Home:** (704) 919-0756  
**Mtns:** (828) 756-2280

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**Course Description:** MKTG 3250. Marketing Strategy Consultancy (3). 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 with an actual client.

**PREREQUISITES:** ALL of the following must be met:  
- Marketing 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

**Suggested TEXT:** See list attached (choose one)

**Course Objectives:** As the capstone course for Marketing majors, the primary goals of this course are to prepare you to think strategically as a marketing professional and to be able to write and present an effective marketing plan.

**Course Methodology:** (1) Class discussion of topics, questions, and strategic issues; (2) Oral presentations to faculty and to the actual client; and (3) Development of a Marketing Plan for the client. Teams of 5 to 6 students will compete in the development of an actual marketing plan for a real client with a real issue. Our client for Fall 2015 is Lowe’s Home Improvement. As the capstone course, Marketing Strategy Consultancy has been developed to present you with a real-world problem for you to demonstrate your capabilities as a marketing student and your potential as a marketing professional. Working as a team – independent of, and in competition with other teams – you will be responsible for developing and presenting a professional marketing plan for the client.

**Attendance:** Class attendance is expected as assignments are required for almost every class. However, 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 is subject to an unsatisfactory grade. Missing the class when the client presents the project (August 31, 2015) for the semester is unacceptable except in the most dire of circumstances. Notify the professor in advance if you will miss class.

**Assignments:** Assignments include submission of different parts of a marketing plan for the Lowe’s project. Each student is responsible for the team’s submission being professional in appearance; proper grammar, spelling, and punctuation; and no plagiarism. Students will present various aspects of the plan to the instructor, a group of faculty, and representatives of the client in a competition that represents the marketing environment. The top two teams will be invited to the client’s offices to present their plan, providing the client believes the work is of sufficient quality. No late work is acceptable.

**Written Assignments:** All written assignments are due on the date assigned and should be typed, double spaced and professional in appearance. Identify all assignments with a cover page that contains the team
number and the team members’ names. For the faculty, staple the paper in the upper left corner; no folders, please. The final copy for the client should be submitted with the most professional appearance your team can create. The instructor will keep all work, so if you desire a copy, duplicate the paper before submitting it. 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). As a group effort, one complete copy of the plan and one copy of the Powerpoint presentation are to be submitted to the instructor on December 2, 2015 unless your team is one of the final two presenting to the client, in which case final slides and plan are due on December 10, 2015. Additional copies will be specified based on the number of clients and faculty participating in the judging of the competition. The final project will be presented in randomly assigned flights to the faculty for selection of four teams to present to the "client.” All of the written plans will be given to the client, provided they are of sufficient quality. The Final Four teams will present to representatives of the client on campus. The two Finalists will travel to the client’s location for the final presentation and selection of the winning team.

**Oral Assignments:** Students will have the opportunity to orally present the results of their findings from the various assignments for their marketing plan almost every week. Each team member is required to present. Maximum time limits will be provided and must be adhered to (as is common in marketing presentations). By the end of the semester, no note cards will be permitted.

**Exam:** The final exam is solely based on the marketing plan which is developed as group work; however, the exam will be independent work as it is used by the Belk College as the assessment of your individual ability to write an effective marketing plan. The final will be given during the final exam period assigned (MKTG 3250-001: Wednesday, Dec 16, 2015 from 8:00 am to 10:30 am). You may take the exam with the other section (MKTG 3250-002: Monday, Dec 14, 2015 from 11:00 am to 1:30 pm) with prior permission. Request permission by 5:00 pm on Dec 4, 2015.

**Peer Evaluations:** All group work will involve peer – as well as self – evaluation of each student’s contribution to the group’s work. Group work is an important part of your learning experience as well as your work as a marketing professional. Each student is expected to report fairly on the work of the members of the group. Calculations of the entire teams’ scores are related just to that team and will be used in computing each student’s final project grade; thus, not all team members will receive the same number of points for the project’s final 600 points. Seriously deficient team members will not receive bonus points.

Each group should keep “notes” of its meetings that include: day, date, and time of the agreed on meeting, who attended, what was covered, and next assignments. A group may fire a member of the group with documentation of just cause. The fired individual will have to do a marketing plan on his/her own. Just cause includes: missing group meetings, missing group meetings for trivial reasons, failure to deliver work in a timely manner, passively accepting the group’s ideas with little or no input that moves the group toward accomplishing its goals, submitting work that is of poor quality requiring others to re-do the work, and not following team rules. The instructor may ask to see your “team notes” periodically.

**Grading:**

<table>
<thead>
<tr>
<th></th>
<th>My Points</th>
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<tbody>
<tr>
<td>Situational Analysis – Internal Environment</td>
<td>100</td>
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<tr>
<td>Situational Analysis – External Environment</td>
<td>100</td>
</tr>
<tr>
<td>Situational Analysis – Competitive and SWOT</td>
<td>100</td>
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<tr>
<td>Target Market, Goals and Objectives</td>
<td>100</td>
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<tr>
<td>Marketing Strategy/Tactics</td>
<td>100</td>
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<tr>
<td>Marketing Tactics/ Timeline</td>
<td>100</td>
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<td>Budget and Controls</td>
<td>100</td>
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<td>Marketing Plan Presentation (final version presented)</td>
<td>100</td>
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<tr>
<td>Marketing Plan (final) <strong>adjusted by peer evaluation</strong></td>
<td>600</td>
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<tr>
<td>Final Exam</td>
<td>600</td>
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<td><strong>Total Points</strong></td>
<td><strong>2000</strong></td>
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<td>Bonus points (25 Final Four, 50 Finals)</td>
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<td><strong>TOTAL</strong></td>
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A = Superior Performance: 1800-2000 points, Total understanding of all material, superior ability to apply knowledge.

B = Good Performance: 1600-1799 points, Excellent understanding and good ability to apply material.

C = Average Performance: 1400-1599 points, Surface understanding of most material and some ability to apply material.

D = Passing Performance: 1200-1399 points, Incomplete understanding of material with some ability to apply material; lack of team participation.

F = Failure to Perform: Below 1200, Lack of understanding of material and little ability to apply material. Lack of timely submission, excessive absences, poor performance evaluation by the team for group work.

This grading scale is based on total points earned. Grades are given by points only, not by percentage, and because the cut-offs must be drawn somewhere, in the interest of being fair to everyone, I do not round up grades. (For example, a 1798 will be a B grade, not rounded up.) Every point earned counts toward your final grade. Requests for students on the bubble to be awarded an extra point will not be granted. Keep accurate records of your grades to ensure that one point will not make a difference at the end of the term.

**ACADEMIC INTEGRITY**

The UNC Charlotte Academic Integrity Policy will be followed. The student is responsible for reading and understanding the policy:

Students have the responsibility to know and observe the requirements of *The UNC Charlotte Code of Student Academic Integrity*. 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 UNC Charlotte. 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. Copies of the code can be obtained from the Dean of Students Office. Standards of academic integrity will be enforced in this course. Students are expected to report cases of academic dishonesty to the course instructor.

**NOTE:**
1. Client and team confidentiality is required; sharing information with anyone outside of your team and your professor for the strategy class is an academic integrity violation. No sharing of information is allowed; no requests for assistance from other professors is allowed unless they have signed the confidentiality agreement.
2. Your peer evaluation must be a fair representation of each member’s contribution. It is a violation of academic integrity to decide among the group, or members of the group, as to point allocations. Base your individual evaluation on the contribution of each group member, including yourself, as fairly as possible.

**STATEMENT of INCLUSION**

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.

**Class Policies**

1. If you arrive late to your presentation for that day, you may not participate and will be counted as absent. Parking is an issue at UNC Charlotte. Plan accordingly. No marketers would be late to a presentation (you would not have a job).
2. The use of cell phones, beepers, etc. is disruptive, and is therefore prohibited during presentations.
3. Professional dress is required when presenting to the faculty and to the client.
4. Please make copies of materials you feel that you need to use in any discussion/presentation prior to class.
5. All graded materials must be returned by December 2, 2015 in the folder provided (all teams except the two finalist teams who have until December 10, 2015).
<table>
<thead>
<tr>
<th>DATE</th>
<th>TOPIC</th>
<th>ASSIGNMENT</th>
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<tbody>
<tr>
<td>M Aug 24</td>
<td>University Convocation No classes held</td>
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<tr>
<td>W Aug 26*</td>
<td>Introduction</td>
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<tr>
<td></td>
<td>Overview of a Marketing Plan</td>
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<tr>
<td>M Aug 31*</td>
<td>Presentation from clients</td>
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<tr>
<td>W Sep 2</td>
<td>Team Presentations (M flight)</td>
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<td>M Sep 7</td>
<td><strong>Labor Day Holiday – No classes</strong></td>
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<td>W Sep 9</td>
<td>Team Presentations (W flight)</td>
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<td>M Sep 14</td>
<td>Team Presentations (M flight)</td>
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<td>W Sep 16</td>
<td>Team Presentations (W flight)</td>
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<td>M Sep 21</td>
<td>Team Presentations (M flight)</td>
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<td>W Sep 23</td>
<td>Team Presentations (W flight)</td>
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<tr>
<td>M Sep 28</td>
<td>Team Presentations (M flight)</td>
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<tr>
<td>W Sep 30</td>
<td>Team Presentations (W flight)</td>
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<td>M Oct 5*</td>
<td>CLASS MEETS (M flight) Project Review</td>
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<td>W Oct 7*</td>
<td>CLASS MEETS (W flight) Project Review</td>
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<tr>
<td>M Oct 12</td>
<td><strong>Fall Break – No classes</strong></td>
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<td>W Oct 14</td>
<td>Team Presentations (W flight)</td>
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<tr>
<td>M Oct 19</td>
<td>Team Presentations (M flight)</td>
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**Student Info Sheets completed and bring to class**
(last page in this document
Form project teams, begin research

Rick Coffee, Edward Crump, Marcus Rountree

Situational Analysis – Internal Analysis
Write-up and slides #1 due** (15 minutes)

Situational Analysis External Environment
(except competitive analysis)
Write-up and slides #2** due (15 minutes)

Situational Analysis External Environment
(except competitive analysis)
Write-up and slides #2** due (15 minutes)

Competitive Analysis and SWOT Analysis
Write-up and slides #3** due (15 minutes)

Competitive Analysis and SWOT Analysis
Write-up and slides #3** due (15 minutes)

Target Market, Goals and Objectives
Write-up and slides #4** due (15 minutes)

Target Market, Goals and Objectives
Write-up and slides #4** due (15 minutes)

Situational Analysis; Goals/Objectives; and Developing Strategies/Tactics
Write-up and slides #5** due (15 minutes)

Situational Analysis; Goals/Objectives; and Developing Strategies/Tactics
Write-up and slides #5** due (15 minutes)

Marketing Strategies/Tactics
Write-up and slides #5** due (15 minutes)

Marketing Strategies/Tactics
Write-up and slides #5** due (15 minutes)
W Oct 21  Team Presentations (W flight)  Marketing Tactics/Timeline  Write-up and slides #6** due (15 minutes)

M Oct 26  Team Presentations (M flight)  Marketing Tactics/Timeline  Write-up and slides #6** due (15 minutes)

W Oct 28  Team Presentations (W flight)  Marketing Budget and Controls  Write-up and slides #7** due (15 minutes)

M Nov 2  Team Presentations (M flight)  Marketing Budget and Controls  Write-up and slides #7** due (15 minutes)

W Oct 4  Final Practice Teams _____ & _____  Marketing Plan  Only slides** due (20 minutes)

M Nov 9  Final Practice Teams _____ & _____  Marketing Plan  Only slides** due (20 minutes)

W Nov 11  Final Practice Teams _____ & _____  Marketing Plan  Only slides** due (20 minutes)

M Nov 16  Presentations to Faculty Judges  Slides due in best format (20 minutes)

W Nov 18  Presentations to Faculty Judges  Slides due in best format (20 minutes)

M Nov 23  Final Four present to client  Revised slides due (20 minutes)

W Nov 25  Thanksgiving Holiday NO CLASSES

M Nov 30  Team Meetings  Prepare for submission of Final Plan and Slides Submission

W Dec 2  Teams not in the Finals  Final Written Marketing Plan and Slides Due plus RETURN Folders

Th Dec 10  Two Finalist Teams Present to Client  Final Written Plans and Slides due (provide slides and written plan to professor and client; Number of copies TBD)

W Dec 16  8:00 am to 10:30 am location TBD  EXAM: Marketing Plan Key Components

* ALL students are required to attend.

** One copy of your written documentation and one copy of your PowerPoint slides (two per page, no color) are due at the beginning of every presentation.

University Policy on Withdrawals:

Students are expected to complete all courses for which they are registered at the close of the add/drop period. If you are concerned about your ability to succeed in this course, it is important to make an appointment to speak with me as soon as possible. The University policy on withdrawal allows students only a limited number of opportunities available to withdraw from courses. It is important for you to understand the financial and academic consequences that may result from course withdrawal.
Marketing Strategy Textbooks – Choose one to purchase or borrow from a library


Name____________________________________Preferred to be called____________________________________

Address____________________________________________________________________________________

Telephone (Work)_______________________(Mobile)___________________

UNC Charlotte Email _________________________________________________

No. of hours completed:_________Major 1: _____________________________________________________________________________

Major 2: ___________________________________________________________________________Minor:_________________________________

Marketing electives completed (means a grade is posted in Banner):

<table>
<thead>
<tr>
<th>Course Name</th>
<th>Professor</th>
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<tr>
<td>1.</td>
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<td>3.</td>
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<td>4.</td>
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Place of work__________________________________________Hours/week____________________________

Career objective____________________________________________________________

___________________________________________________________________________________________

What skills do you bring to a team? ___________________________________________________________

___________________________________________________________________________________________

How do you learn best?_______________________________________________________________________

___________________________________________________________________________________________

I will be graduating in   May     December     Summer    20______

(Circle one)

I will return all graded work by December 2, 2015 ________________________________ signed

Anything I should know about you this semester? ____________________________________________