

MARKETING STRATEGY CONSULTANCY
MKTG 3250-002 Spring Semester 2017 CRN 23339
Monday/Wednesday 9:30-10:45 am Friday Building Rm 132

Instructor: Dr. L. Swayne, Professor
Department of Marketing
Office: Friday Room 240B, UNC Charlotte Campus
Office Hours: Monday 1:30 - 3:30 pm campus
and by appointment

Email: leswayne@uncc.edu*
Phone: (704) 687-7602
Home: (704) 919-0756
Mtns: (828) 756-2280
* email preferred

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 three marketing elective courses (MKTG 32XX courses) with “C” or better
- Senior standing
- Marketing major

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.

As the capstone course, Marketing Strategy Consultancy has been developed to present a “signature experience” for our majors. A real-world issue faced by a local business provides the opportunity for students to demonstrate their marketing capabilities and potential as marketing professionals. Working as a team – independently of, and in competition with other teams – a group of 6 students will be responsible for developing and presenting an actual marketing plan for a real client with a real issue.

Attendance: **Regular attendance is necessary for doing well in this class. We will learn by doing. Students must remain available for all designated class times.** You are expected to attend punctually all scheduled sessions and are responsible for completing the work from all of the class meetings. Attendance will be taken at random during the semester and will be counted. You are responsible for any material covered, announcements made, assignments passed out, and any other type of work you may miss during any absence from class. ***Tardiness or early departure is disruptive and is, of course, strongly discouraged.***

Attendance is mandatory for classes on Jan 9, Jan 11, Jan 18, Jan 23, and Feb 6. Class attendance is expected as assignments are required for every class. However, realistically, there may be an occasion when you are unable to attend class. If you are responsible for presenting information 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 failing. Missing the class when the client presents the project for the semester (January 18, 2017) is unacceptable except in the most dire of circumstances.

Assignments: Assignments include submission of 8 different parts of a marketing plan for the semester project. Each student is responsible for the team's submission being professional in appearance; proper grammar, spelling, and punctuation; and no plagiarism. If your name is on it, you are responsible for it. 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 at any stage of the process.

All students (and faculty) will be required to sign a Non-Disclosure Agreement to preserve client confidentiality. It is a legal document and binding on all of us.

- Written Assignments:** All written assignments are due on the date assigned and should be typed, double spaced and professional in appearance. Use the APA format for citations/references.
- Identify all assignments with a cover page that contains the team number/letter, the team members' names in alphabetic order, and an executive summary for the part being presented (should fit on the one title page/cover page).
 - 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).
 - The final project presentation (#8) will be randomly assigned to flights for the faculty to select the Final Four teams to present to the "client." Additional copies of the PowerPoint presentations will be specified based on the number of faculty and clients participating in the judging.
 - The Final Four teams will present to representatives of the client on campus who will determine the two teams to present to the client. The two Finalist teams will travel to the client's location for the final presentation and selection of the winning team.
 - As a team effort, one complete copy of the plan and one copy of the Powerpoint presentation are to be submitted to the instructor on **April 26, 2017**.
 - All of the written plans will be given to the client, provided they are of sufficient quality.

Oral Assignments: Students will 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. The first slide should contain team number and members' names, in alphabetical order. Maximum time limits will be provided and must be adhered to (as is common in marketing presentations). By the presentation to the faculty, no note cards will be permitted, although most teams are not using note cards much sooner.

The seven major elements of the Marketing Plan, corresponding to the seven regular team presentations assignments, will each last no more than 15 minutes. Once teams have been formed, requests for day and time will be on a first-come, first-served basis, unless a team can justify a given time period. Teams will be assigned the same regular time for these presentations in each relevant week. The times for Team Presentation #8 and presentation times for faculty judging will be assigned separately. Only the top 5-6 teams will be able to present to the faculty panel of judges.

Textbook: Strategy is creative and requires individualized contribution to a team. Many different ways exist to develop marketing strategies; however, common elements are expected in a marketing plan. Although a specific text is not required, any of the following books present worthwhile approaches. Each team is required to secure and use at least one of the following as a reference:

Marketing Strategy Textbooks Choose at least 1 to purchase, lease, or borrow from a library:

1. Aaker, David A. *Strategic Marketing Management*, 10th ed (NY: John Wiley & Sons, 2014).
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, 2013).
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 Robert A. Peterson, *Strategic Marketing Problems*, 13th edition (Boston: Pearson Education, 2013).
7. Walker, Orville C. and John W. Mullins, *Marketing Strategy: A Decision-Focused Approach*, 8th edition (Burr Ridge, IL: McGraw-Hill, 2013).

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 for assessment of your individual ability to write an effective marketing plan. The final exam will be given during the period assigned:

8:00 am class MKTG 3250-001: Monday, May 8, 2017 from 8:00 am to 10:30 am.

9:30 am class MKTG 3250-002: Wednesday, May 10, 2017 from 8:00 am to 10:30 am.

11:00 am class MKTG 3250-003: Monday, May 8, 2017 from 11:00 am to 1:30 pm.

With prior permission, the exam may be taken with a different class. Your request must be made via email by 5:00 pm on April 28, 2017; space limitations mean not all requests may be met.

Peer Evaluations: All team work will involve peer – as well as 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 working as a marketing professional. Each student is expected to report fairly on the work of the members of the team. 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 team may fire a member 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 cause includes: missing team meetings without prior notification, 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.

Class Behavior: Inappropriate behavior in class distracts from the ability of others to profit from their in-class experience. Such inappropriate behavior includes arriving late, leaving early, talking, surfing the net during the class, and so on. Rude and inappropriate behavior will not be tolerated. Because it is my responsibility to provide an environment that is conducive to learning for everyone in the class, I will deduct points from the grade of any student who chooses to repeatedly distract others. In particularly egregious cases, I will have the student permanently removed from the class.

Under no circumstances will students be permitted to spend their class time working on assignments for other classes, checking e-mail, surfing the Web, or printing out

homework. Attempts to engage in such behavior will be reflected in lower grades and may lead to removal from the course.

Electronic Devices: Use of cellular phones and similar devices is prohibited in the classroom. Cellular phones **MUST BE TURNED OFF DURING CLASS** and students are strongly discouraged from checking their cell-phone messages when the class is in progress. Use of instant messaging, email or other communication technologies during class time is prohibited. You may use a laptop to take notes during the class, but this should be done without distracting other students and without distracting you from the topic of discussion. *I will take very seriously any complaints from fellow students who are distracted by non-class related use of electronic devices by any student.*

It is a violation of intellectual property rights for you to use your phone or other device to “record” any materials provided in class – screens, slides, grading sheets, etc. It is rude, and perhaps illegal, to use your cell phone in this manner without explicit permission to do so. Students violating these policies will be marked for disruptive behavior and may be asked to leave the class. Their grade will also be affected according to the class rules.

Quality of Work: The expectation is for professional quality work both in terms of content and presentation.

- Spelling, grammar, punctuation, clarity of expression, presentation and appropriate documentation (use APA style) will count in every piece of work you do for this course. If you have trouble with spelling, grammar or punctuation, have someone proofread your submission. Use the Writing Center – it’s free and helpful!
- Your grade will be based on what you say or write and how you present it. It becomes difficult to read for content if the mechanics are sloppy, and a superior job may not be recognized as such if presented in an error-laden manner.
- Good ideas sloppily expressed will receive mediocre grades, as will flashy presentations that lack content.
- Students whose native language is not English must meet the same quality requirements as others.

All work submitted for evaluation (including team and individual work) must be neat and clearly marked indicating the assignment topic, team letter/number and team members’ names in alphabetical order. No work may be submitted electronically without prior permission to do so (or requested by the instructor). Any electronic file must include Topic and Team letter/number so that the instructor can easily understand what the file represents. Although this is not a language class, the instructor will deduct points for typos or grammatical errors in submitted work. Whether individual work or group work, thoroughly review what has been written before submission. Do not ask/expect the instructor to review your written work before submission for feedback; however, I am available for discussing ideas at any time.

Team Work: Each team is responsible for organizing itself, dividing up the work, and deciding how relative contributions should be measured. It is the responsibility of the team to ensure that all team members understand all concepts related to the completed paper and presentations. The instructor may ask questions about any completed part of the project to any team member and any incomplete or unsatisfactory answers will affect the team grade. **The instructor will use peer evaluations to obtain feedback on group member contributions and institute appropriate grade penalty for lack of participation. This grade penalty will be limited to the marketing plan paper (600 points) that is team-based.**

Grade Appeals: If you believe that a grade you received on a presentation/paper assignment/exam was in error or unfair, or a question on the exam was unfair or ambiguous, you may appeal it according to the following guidelines:

1. You must indicate specifically and in writing the reason for your appeal. The appeal should clearly state the reasons why you believe the grade to be unfair or the nature of the error.

2. The entire examination concerned will be regraded. Your grade can go UP or DOWN.
3. Appeals must be turned in NO LATER than one week after the exam or paper has been returned to you to review. Overdue appeals will not be considered.

Incomplete grade policy: An incomplete is not based solely on a student’s failure to complete work or as a means of raising his/her grade by doing additional work after the grade report time. An incomplete grade can be given when a student has a serious medical problem or other extenuating circumstance that legitimately prevents completion of required work by the due date. In any case, the student’s work to date should be passing, and the student should provide proper written proof (e.g., a doctor’s note), in order to receive a grade of “I.”

Exam Ownership: Exams and grading sheets take many hours to prepare and, as a form of intellectual property, belong to those who create them (your professors). Exams must remain in my possession or under my control at all times. **This means that exams cannot be taken out of the room during their administration or during their review, unless specifically permitted by the instructor.** Removing an exam from my presence at any time will be considered theft of intellectual property. Such action will result in an exam grade of zero and may warrant further disciplinary action.

Grading sheets will not be distributed ahead of assignments. They are used by the instructor to provide consistency in grading across multiple teams. Topics included are general to any marketing plan and will all be covered in the first few classes. All students are encouraged to review their project grade sheets, understand those items marked as “Not Covered” or “Barely Adequate,” and meet with the professor during office hours or through email to discuss changes for the final plan.

		My Points
Grading:	1. Situational Analysis – Internal Environment	100 _____
	2. Situational Analysis – External Environment	100 _____
	3. Situational Analysis – Competitive and SWOT	100 _____
	4. Target Market, Goals and Objectives	100 _____
	5. Marketing Strategy/Tactics	100 _____
	6. Marketing Tactics/ Timeline	100 _____
	7. Budget and Controls	100 _____
	8. Marketing Plan Presentation (final version presented)	100 _____
	Marketing Plan (final; adjusted by peer evaluation)	600 _____
	Final Exam	<u>600</u> _____
Total Points	2000 _____	
Bonus points (50 Final Four, 75 Finals)		_____
TOTAL		_____

- 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.

Final Grades: 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.

UNIVERSITY POLICIES AND PROCEDURES

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. This class operates as a team project for the entire semester. Teams are in competition with each other, and this competition extends across all sections of the course. In addition, students will be required to sign a Non-Disclosure Agreement (NDA), which is a legal and binding document. NDAs are routine in the business world and required by our client company. These factors mean that students may not communicate about this project to anyone outside their own team members, the course instructor, and the company representatives (when they are on campus). **Attempting to contact company representatives following the in-class presentation is not permitted.** Teams may request that the professor contact the company for the answer to a specific question; such a request may not be granted as the organization is participating because they know that they have a specific time commitment. Breaking a legal contract (the NDA) has serious consequences, whether intentional or not, and will lead to a failing grade for the course. **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. Plagiarism is a violation of academic integrity. All ideas, statements, quotes, etc should be properly attributed to the source. Follow the APA style. Our UNC Charlotte librarians are knowledgeable about appropriate referencing/documentation of others work or ideas.
3. **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.

ACCOMMODATIONS for DISABILITIES

In compliance with the Americans with Disabilities Act (ADA), all qualified students enrolled in this course are entitled to "reasonable accommodations." Please notify the instructor during the first week of class of any accommodations needed for the course.

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 with me as soon as possible. The University policy on withdrawal allows students only a limited number of opportunities to withdraw from courses. It is important for you to understand the financial and academic consequences that may result from [course withdrawal](#).

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 marketing 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. Communicate with the instructor in a professional manner. The subject line in all emails should begin with "MKTG 3250 Team X" with X representing your team number.
6. **All graded materials (kept in the folder provided) must be returned by April 26, 2017** along with the final copies (printed and electronic) of the team's PowerPoint slides and marketing plan paper. All teams' electronic files will be given to the client.

Tentative Course Outline

Day	date	topic	Assignment	hand in
Mon.	Jan 9*	Overview of a Marketing Plan	Student Information Sheet Finalize teams	Student Info Sheet
Wed.	Jan 11*	Research and APA style	Nicole Spoor, Business Librarian, UNC Charlotte	
Mon.	Jan 16	MLK DAY No Classes		
Wed.	Jan 18*	Project Presentation by client		
Mon.	Jan 23*	Topics in a Marketing Plan		
Wed.	Jan 25	TEAM work		
Mon.	Jan 30	Team presentation #1	Situational Analysis – Internal Analysis	write-up & slides #1**
Wed.	Feb 1	(15 minutes)		
Mon.	Feb 6*	Team Feedback		
Wed.	Feb 8	Team workshop		
Mon.	Feb 13	Team presentation #2	Situational Analysis - External Environment (exclude competition)	write-up & slides #2**
Wed.	Feb 15	(15 minutes)		
Mon.	Feb 20	Team presentation #3	Competitive Analysis & SWOT	write-up & slides #3**
Wed.	Feb 22	(15 minutes)		
Mon.	Feb 27	Team presentation #4	Target Market, Goals,	write-up & slides

Wed.	Mar 1	(15 minutes)	Objectives	#4**
March 6-8		Spring Break No Classes		
Mon.	Mar 13	Team presentation #5	Marketing Strategy & Tactics	write-up & slides #5**
Wed.	Mar 15	(15 minutes)		
Mon.	Mar 20	Team presentation #6	Marketing Tactics & Timelines	write-up & slides #6**
Wed.	Mar 22	(15 minutes)		
Mon.	Mar 27	Team presentation #7	Marketing Budget & Controls	write-up & slides #7**
Wed.	Mar 29	(15 minutes)		
Mon.	Apr 3	Team presentation #8	Completed Marketing Plan (date and time TBD)	slides #8**
Wed.	Apr 5	Final practice (25 minutes/team)		
Mon.	Apr 10	Team presentation #8	Completed Marketing Plan (date and time TBD)	slides #8**
Wed.	Apr 12	Final practice (25 minutes/team)		
Mon.	Apr 17	Top 6 teams present to faculty judges Topic: TBD	Marketing Plan Presentations to Faculty (date and time TBD)	Provide copies of slides for faculty judges (# copies TBD)-
Wed.	Apr 19	Top 6 teams present to faculty judges Topic: TBD	Marketing Plan Presentations to Faculty (date and time TBD)	
Mon.	Apr 24	Final Four Teams to present to client on campus	Marketing Plan Presentations to client	
Wed.	Apr 26	All teams	Final Marketing Plan & Slides due during class time	
Wed.	May 3	Final 2 teams present at client HQ between 8:30-10:30 am	One Copy Final Marketing Plan for client Slides for attendees (# of copies TBD)	
Mon.	May 8	Final Exam: Marketing Plan Key Components	Sec-001 8:00 am - 10:30 am Monday, May 8 Sec-003 11:00 am – 1:30 pm Monday, May 8	
Wed.	May 10	Final Exam: Marketing Plan Key Components	Sec-002 8:00 am - 10:30 am Wednesday, May 10	

* ALL students are required to attend. ** One copy of your written documentation + one copy of your ppt slides (two per page, no color) are due at the beginning of every presentation.

STUDENT INFORMATION
MKTG 3250 Spring 2017

Bring completed to Class on January 9, 2017

Last Name _____ First Name _____ Preferred to be called _____

Address _____

Telephone (Mobile) _____ (Work) _____

UNC Charlotte Email _____

No. of hours completed: _____ Major 1: _____

Major 2: _____ Minor: _____

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

Course Name	Grade	Professor
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____

Place of work _____ Hours/week _____

Career objective _____

My written skills 1 2 3 4 5 6 7 8 9 10 (circle one, 10 is highest)

My oral presentation skills 1 2 3 4 5 6 7 8 9 10 (circle one, 10 is highest)

My marketing knowledge and ability to apply it 1 2 3 4 5 6 7 8 9 10 (circle one, 10 is highest)

How do you learn best? _____

I will be graduating in May December Summer 20_____
(Circle one)

I will return all graded work by April 26, 2017 _____
signed

Anything I should know about you this semester? _____