

# Course Syllabus

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## **COURSE NUMBER: BUS 771 (091C)**

**CLASSROOM:** On-Line  
**CLASS TIME;** -----  
**INSTRUCTOR:** Dr. David Eliot Duncombe  
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**PHONE:** Office: (920) 424-1462. Cell 920-939-1717  
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(Please include **BUS-771** in the subject line in your emails.)

**OFFICE HOURS:** Call for Appointments

Last modified on 01/20/2019

## ***COURSE DESCRIPTION***

A functionally integrated approach to planning, implementing marketing strategies and tactics. Emphasis is placed upon the use of marketing information systems, modeling and quantitative techniques in the identification and exploitation of environmental opportunities and upon the formulation of strategies in product development, physical distribution and channel management, marketing communication and pricing.

Prerequisite: The completion of all Foundation requirements. Enrollment limited to Graduate Business students (GBUS) or department consent.

### ***COURSE OBJECTIVES***

Marketing Strategy is designed to be a capstone marketing course. In this course we adopt the Interactive Learning Model of the Harvard Business School. The model operates under the premise that "success in business comes from experience and knowledge, from the ability to analyze and reflect, from observing and interacting with others, and learning from these encounters."

The primary learning objective in this course is to develop a mental framework for solving general marketing problems. Much of the material in this class may not be new; the focus is on the use of concepts to make evaluations and decisions about marketing. Having taken a variety of courses prescribed by the MBA program, you are now ready to put all the pieces together for a complete picture. You will work with the tools you have developed in other courses and play the role of a marketing manager.

In a nutshell, one's marketing strategy should provide a roadmap for one's organization that identifies where it is, where it wants to go, and how to close the gap between the current and desired state. Strategy marketing should have a long-term view and should tell a story that ties together different marketing and business issues. It requires creative skills to imagine alternative futures, research skills to collect information, analytics skills to assess problems and identify options to solve them, and decision skills to select the best options. The class provides opportunities to apply these skills at each stage of the marketing planning process and to summarize the results into strategic stories that can persuade others to follow your recommendations and guide them as they do it..

## Learning Goals

In the category of	COB Graduates will possess the skills necessary to	771 Class Goals: Students will be able to:
1 Leading organizations	Establish shared organizational goals and inspire others to achieve those goals	§ Define strategic marketing objectives and develop plans taking into account their cross-functional impact on the entire enterprise. § Identify elements of a socially responsible and ethical culture and how ethical leadership affects business results.
2 Managing organizational strategy	Develop, manage, and execute strategy to achieve organizational objectives.	§ Critique, assess, and develop organizational objectives with attention to the relationships and perspectives of all stakeholders. § Understand the role of strategic marketing planning in enterprise planning § Develop the process steps to implement an integrated marketing plan.

		§ Measure the success of a marketing plan during and after implementation.
3	Solving organizational problems	<p>Solve complex organizational problems</p> <p>§ Develop and analyze scenarios as a problem-solving best practice.</p> <p>§ Recognize the cross-functional implications of marketing decisions</p>
4	Communicating organizational issues	<p>Communicate complex business issues in a precise and succinct manner for the purpose of informing, persuading and/or engaging the communication recipient.</p> <p>· Present written and verbal information in a focused and well-organized manner suited to the intended audience.</p>
5	Managing organizational resources	<p>· Evaluate the financial implications of marketing activities and how to assess trade-offs among different tactics.</p> <p>Develop and work within a systems view of the organization and its areas of functional expertise.</p>

## **TOPICS**

The following topic will be covered:

Topic 1: Introduction to Marketing Strategy

Topic 2: Customer-Driven Strategy: Framing Markets and Targeting Customers

Topic 3: The Strategic Marketing Planning Process

Topic 4: Achieving Focus and Establishing Priorities

Topic 5: Situation/Environmental Analysis

Topic 6: Customer Analysis, Customer Satisfaction & Loyalty, and Lifetime Value

Topic 7: SWOT Analysis and Identification of Key Issues

Topic 8: Strategic Differentiation & Brand Positioning

Topic 9: Marketing Mix Strategies: New Product and Brand Management

Topic 10: Marketing Mix: Strategic Pricing

Topic 11: Marketing Mix: Placement and Integrated Marketing Communication

Topic 12: Implementation, Control, Metrics

Topic 13: Ethics, Social Responsibility, and Sustainability

Topic 14: International Considerations

## **COURSE MATERIAL**

Required:

- Ferrell, O.C. and Hartline, M.D. (2014 & 2011), *Marketing Strategy*, Mason, OH: South-Western Cengage Learning. (6th edition has a version with and without cases) Do not get new online version.
- Kim, W. Chan and Renée Mauborgne (2015), *Blue Ocean Strategy, Expanded Edition: How to Create Uncontested Market Space and Make the Competition Irrelevant*, Boston, Massachusetts: Harvard Business School Press. [The old version from 2005 could serve you as well]
- Birnbaum, Bill (2004), *Strategic Thinking: A Four Piece Puzzle*, Costa Mesa, CA: Douglas Mountain Publishing
- *Capstone Business Simulation Subscription* (manual is available on <http://www.capsim.com/> (<http://www.capsim.com/>) after registration)
- **Selection of Articles** – Business articles related to the weekly topics are posted on our course site.

**Suggested:**

- *Suggested Readings* (SR) – Articles related to the topic of discussion are uploaded on our course site. They provide deeper theoretical insights. Some of the content may be advanced.
- Additional articles of your choosing that will assist you in formulating your contribution to the class discussions and in understanding the topic area.

Recommended / Optional:

- Any guidebook for developing a marketing plan. This can also be a basic marketing text book as they often contain sample plans. Sample guidebook: Wood, Marian Burk, *The Marketing Plan Handbook*, Upper Saddle River, NJ: Pearson/Prentice Hall.
- Sample outline in course site.

## **GRADES**

Your grade will depend on how well you perform on the requirements of the course. If some parts are not clear to you, I will be glad to explain it in greater detail.

<b>Strategic Issue Recommendation.....</b>	<b>100 points</b>
<b>Simulation (Team Project) .....</b>	<b>100 points</b>
	Performance 90 points
	Strategy 10 points
<b>13 Quizzes .....</b>	<b>130 points</b>
<b>Contribution to Weekly Discussion Topics .....</b>	<b>140 points</b>
<b>Marketing Plan (Team Project).....</b>	<b>100 points</b>
<b>Group Participation in Marketing Plan and Simulation.....</b>	<b>30 points</b>
<b>TOTAL POINTS</b>	<b>600 points</b>

The table below indicates how scores are converted into grades.

<b>Score</b>	<b>Letter grade</b>
= > 93	A
90 < 93	A-
87 < 90	B+
83 < 87	B
80 < 83	B-
77 < 80	C+
73 < 77	C
< 60	F

At the end of the semester there may be a curve applied at teacher's discretion.

### ***Strategic Key Issue Recommendations***

You are responsible for one case analysis for a company that seems to be confronted with or is making some strategic marketing changes. The report is due on the date indicated on the weekly schedule. The

report should be approximately 3 to 5 single-spaced or 6-10 double-spaced pages long. I expect a concise and well-written report that provides sufficient detail about the case analysis. I also expect this to be a strategic marketing recommendation. Due to the mid-course timing of this analysis, the recommendation will end with prioritizing the key issues facing the company using the steps and tools in the course up to that point. Unlike the marketing plan, it will not require program changes, implementation plan, or financial assessment.

When preparing the case, place yourself in the role of the decision-maker. First, perform the necessary analysis to identify the problems/key issues to be solved. The analysis will be graded according to the following criteria:

#### Situation Analysis (60%)

- Introduction of the company and some historical context to current situation.
- Assessment of current goal/ objective priorities based upon management comments, analyst commentary, mission, and vision statements, and financial results.
- Summary of the three environmental conditions impacting the business:
  - External (industry/competitive, customer, PESTLE)
  - Customers (Target, level of access, current relations, demand trends)
  - Internal (financial resources, organizational and cultural strengths and weaknesses, demonstrated competitive advantages and disadvantages, and relationship with marketing and supply chain partners )

#### Key Issue identification (30%)

- Appropriate transfer of key observations from the situation analysis to SWOT
- Proper identification of at least 3 key issues from the SWOT: Opportunities or threats with assessment of firm's capabilities (strengths and weaknesses) to address.
- Prioritization of key issues with rationale.

#### Presentation of Written report (10%)

- Organization of report (e.g., flow, clarity, to the point),
- Writing style (easy to understand, free from grammatical errors), professionally written.

### **Quizzes**

The 13 online quizzes cover the assigned readings for the week and are open book. Each quiz usually consists of 10 questions (multiple choice, multiple selection, and/or true/false questions.) The quiz for the week should be completed according the timing in the weekly schedule. The time duration per quiz is limited to 45 minutes.

### **Weekly Discussions**

You are expected to participate in our weekly discussions. You can find the discussion questions in the overview section for each week posted in the course site. The discussion questions relate to the assigned readings for the week. Each student should be prepared to offer views and explanations on the subject

being studied. You may want to augment this material with links and comments to additional articles of your choice.

Remember that a good portion of your grade depends on how well you can apply your marketing knowledge to different situations. In grading this component of the course, I will consider the quality of information as well as the ways in which ideas are articulated. You need to make yourself and your work noticeable.

To earn full credit for your weekly discussion participation you must do two things:

1. Provide a one or two-paragraph well-thought out answer to the posted question. Citation of external sources (e.g., Business Week or Fortune Magazine article) contributes to the grade.
2. Provide a substantive comment on the answer to at least one additional persons post.

I will be following-up on these threads each week in the class following the discussion period with a summary of key takeaways from the discussion and additional comments in the announcement sections.

### **Capstone Simulation**

We will be using an innovative computer simulation game for this class ([www.capsim.com](http://www.capsim.com) (<http://www.capsim.com/>)). The simulation is designed to give you a more realistic “feel” for how business decisions affect the organization as a whole. Thus, in addition to marketing-based decisions, you will also be making decisions concerning such areas as finance, R&D, and production. An important goal with regard to the simulation is to gain a better appreciation for how the functional areas within a firm work together to achieve stated objectives.

- Each student enrolled in the class will need to purchase the simulation from the online vendor. The individual price is about **\$53.99**.
- I have set up 2 simulation for this course in order to keep team member sizes low. I will let you know which one to sign up for after introductions are complete in the first week.
- Please check your group assignment in D2L. The name of the class is: **BUS 771 Marketing Strategy**.
- There will be 5 companies in each simulation, with each team having 3-4 I will assign team members in the first week. You will compete with the other companies in the same industry, but not companies in the other industry. You will work with the same group for the marketing plan.

You will be instructed to submit a graded, one-page summary that outlines the general strategy that the team will pursue during the simulation. In the summary, select three measures (out of the seven possible: revenue, profit, stock price, ROA, ROS, ROE, unit market share) which you want to be graded on. Your strategy and the three measures should be related. Read the success measure definitions carefully. For example, market share is industry unit share, not share of one segment. The strategy/measures deadline is on the weekly class schedule, but adjustments are allowed through competitive Round 3

- Round decisions are to be submitted by the corresponding deadlines per the weekly schedule. Rounds are processed automatically right after the deadline. Rounds cannot be reprocessed, so make sure all decisions are submitted on time.
- The capstone grade will be based on the three success measures averaged for the last three rounds. Your grade will be based upon the average rank for the last three rounds according to the criteria that you picked at the beginning of the course. The table below indicates how your Round-6, Round-7 and Round-8 success on selected three measures convert into a score.

## Rounds 6, 7, and 8

Place	Measure	Measure	Measure
	1	2	3
1st	100	100	100
2nd	95	95	95
3rd	90	90	90
4th	85	85	85
5th	80	80	80
6th	75	75	75

I want to emphasize that there are multiple ways to “win” in this simulation and so this scoring process does not mean that someone has to “fail.” The scoring is based upon the measures you pick, which should correspond to the strategy that you select. Not everyone will have the same measures.

This score can be adjusted. For instance, even if your ‘score’ is good, but I see you drifted from your intended strategy without clear reason, or you had clear coordination problems, then I may lower your score. I may adjust personal scores to be different from team scores if I understand that some team members did not participate substantially in the decision-making process.

### ***Marketing Plans***

This is also a team assignment. Each team is responsible for writing a marketing plan for a good or service of their choosing. Please refer to the “Main Sections of a Marketing Plan” file posted in the content area / course information area of our course site. Your grade for this assignment will be derived as follows:

#### **Written Marketing Plan**

1. Executive Summary (5%)
2. Situation Analysis (20%)
3. Goals / Objectives (10%)

4. Target Market Description & Analysis (5%)

5. Marketing Strategy (10%)

6. Marketing Program (25%)

7. Ethical Guidelines and CSR Activities (5%)

7. Financial Plans (10%)

8. Implementation controls (5%)

- Appendix

- Creativity of Marketing Plan (5%)

\The teams for the marketing plan will be the same as for the simulation. The deliverable for the grade is a Word document or PDF similar to examples in the course site (there may be some differences from these examples due to changes in requirements from term to term, so the control criteria is the one above). If you have questions about where the examples seem to differ from this document, please let me know to avoid confusion.

### ***Weekly Scheduled Readings***

The weekly schedule contains information about the overall flow of the course as well as week-by-week assignments and readings. You can find the class schedule as a separate posting on our course site. The quiz-related materials are identified as such and understanding of the content will be tested within the quiz.

### ***A NOTE ON GROUP WORK***

Working in groups may be more difficult than working alone. Be prepared to face the challenges of working with people, something you will do throughout your career, and avoid finger pointing at the end of the semester. Allow me to provide assistance and guidance in the early stages of your project and organizing your group. Ask, and you will receive support.

Organize early and you will be rewarded! Select a team leader who can organize meetings, keep assignments on time, and make the administrative burden much lighter on everyone. Remember, the only people responsible for an efficient team are the team members! If there are minor difficulties in scheduling, assignments, etc., at the beginning, I will be glad to lend a hand to organize the team.

Due to the fast timeline in the course and the distributed geography of the students, getting to know the others in your group quickly is important. I suggest using technology, such as Google Meet-up, as a way to conduct on-line video meetings and to sharing desktops for Capsim and the Marketing Plan

"Freeloaders" exist only if the team allows it. Do not complain at the end of the semester that a member of the team did not do his or her part. Let me know at the beginning of such tendencies. We will have a peer evaluation check in early in the course and a final review at the end. Part of the total grade for individuals for the simulation or the marketing plan have participation elements built in and grades may be downwardly adjusted further depending on the peer evaluation.

### ***POLICY ON ACADEMIC HONESTY AND INTEGRITY***

As a UW Oshkosh student, it is your responsibility to be informed about what constitutes academic misconduct, how to avoid it and what happens if you decide to engage in it. Examples of academic misconduct include (but are not limited to):

- plagiarism (turning in work of another person and not giving them credit),
- stealing an exam or course materials,
- copying another student's homework, paper, exam
- cheating on an exam (copying from another student, turning in an exam for re-grading after making changes, working on an exam after the designated time allowance)
- falsifying academic documents

Please refer to UWS Chapter 14 (University of Wisconsin Student Academic Disciplinary Procedures) for information on academic misconduct <<http://www.uwosh.edu/deanofstudents/university-policies-procedures/academic-misconduct>>. Pay particular attention to UWS 14.03 (definition of academic misconduct) and UWS 14.04 (disciplinary sanctions). Please note that all incidents of academic dishonesty will be reported to the appropriate university authorities.

It is not acceptable for two or more students to work together and turn in the same work unless the assignment is specifically a group assignment. In the case of a group assignment, groups are treated as a unit and the sharing of work between groups is not permitted. Plagiarism is defined as the use of another's work without attribution. It is acceptable to use a published solution to a particular problem if the solution's source is documented. If you are using material from a published source or an organization's internal documents, that source must be documented or referenced. If proprietary materials are utilized, appropriate permissions must be obtained.

### ***DISCLOSURE***

Students are advised consult the following URL for disclosures about essential consumer protection items required by the Students Right to Know Act of 1990. <http://uwosh.edu/financialaid/consumer-information> (<http://uwosh.edu/financialaid/consumer-information>).

If there is *any* confusion regarding the instructions for *any* assignment for this course, please consult me (the professor for the course) directly and immediately.

## Course Summary:

Date	Details
Tue Feb 12, 2019	

due by 11pm

Date	Details	
	<a href="https://uwosh.instructure.com/courses/148508/assignments/433874">Quiz 1 -- Customer-Driven Strategy</a> <a href="https://uwosh.instructure.com/courses/148508/assignments/433874">(https://uwosh.instructure.com/courses/148508/assignments/433874)</a>	
Tue Feb 19, 2019	 <a href="https://uwosh.instructure.com/courses/148508/assignments/433867">Quiz 2 - Strategic Marketing Planning</a> <a href="https://uwosh.instructure.com/courses/148508/assignments/433867">(https://uwosh.instructure.com/courses/148508/assignments/433867)</a>	due by 11pm
Tue Feb 26, 2019	 <a href="https://uwosh.instructure.com/courses/148508/assignments/433869">Quiz 3 -- Focus</a> <a href="https://uwosh.instructure.com/courses/148508/assignments/433869">(https://uwosh.instructure.com/courses/148508/assignments/433869)</a>	due by 11pm
Tue Mar 5, 2019	 <a href="https://uwosh.instructure.com/courses/148508/assignments/433862">Quiz 4 - Situation Assessment</a> <a href="https://uwosh.instructure.com/courses/148508/assignments/433862">(https://uwosh.instructure.com/courses/148508/assignments/433862)</a>	due by 11pm
Wed Mar 6, 2019	 <a href="https://uwosh.instructure.com/courses/148508/assignments/433878">Capsim Strategies and Measures</a> <a href="https://uwosh.instructure.com/courses/148508/assignments/433878">(https://uwosh.instructure.com/courses/148508/assignments/433878)</a>	due by 11pm
	 <a href="https://uwosh.instructure.com/courses/148508/assignments/433879">Discussions Weeks 0-5</a> <a href="https://uwosh.instructure.com/courses/148508/assignments/433879">(https://uwosh.instructure.com/courses/148508/assignments/433879)</a>	due by 11:59pm
Tue Mar 12, 2019	 <a href="https://uwosh.instructure.com/courses/148508/assignments/433865">Quiz 5 - Customer Assessment</a> <a href="https://uwosh.instructure.com/courses/148508/assignments/433865">(https://uwosh.instructure.com/courses/148508/assignments/433865)</a>	due by 11pm
Tue Mar 19, 2019	 <a href="https://uwosh.instructure.com/courses/148508/assignments/433864">Quiz 6 - SWOT</a> <a href="https://uwosh.instructure.com/courses/148508/assignments/433864">(https://uwosh.instructure.com/courses/148508/assignments/433864)</a>	due by 11pm
Tue Apr 2, 2019	 <a href="https://uwosh.instructure.com/courses/148508/assignments/433875">Quiz 7 - Differentiation and Positioning</a> <a href="https://uwosh.instructure.com/courses/148508/assignments/433875">(https://uwosh.instructure.com/courses/148508/assignments/433875)</a>	due by 11pm
Fri Apr 5, 2019	 <a href="https://uwosh.instructure.com/courses/148508/assignments/433883">Strategic Issue Recommendation</a> <a href="https://uwosh.instructure.com/courses/148508/assignments/433883">(https://uwosh.instructure.com/courses/148508/assignments/433883)</a>	due by 11pm
Tue Apr 9, 2019	 <a href="https://uwosh.instructure.com/courses/148508/assignments/433873">Quiz 8 - Product Management</a> <a href="https://uwosh.instructure.com/courses/148508/assignments/433873">(https://uwosh.instructure.com/courses/148508/assignments/433873)</a>	due by 11pm
Tue Apr 16, 2019	 <a href="https://uwosh.instructure.com/courses/148508/assignments/433871">Quiz 9 -- Pricing</a> <a href="https://uwosh.instructure.com/courses/148508/assignments/433871">(https://uwosh.instructure.com/courses/148508/assignments/433871)</a>	due by 11pm
Tue Apr 23, 2019	 <a href="https://uwosh.instructure.com/courses/148508/assignments/433870">Quiz 10 -- Placement and Promotion</a> <a href="https://uwosh.instructure.com/courses/148508/assignments/433870">(https://uwosh.instructure.com/courses/148508/assignments/433870)</a>	due by 11pm
Tue Apr 30, 2019	 <a href="https://uwosh.instructure.com/courses/148508/assignments/433866">Quiz 11 -- Implementation</a> <a href="https://uwosh.instructure.com/courses/148508/assignments/433866">(https://uwosh.instructure.com/courses/148508/assignments/433866)</a>	due by 11pm
Wed May 1, 2019	 <a href="https://uwosh.instructure.com/courses/148508/assignments/433877">Capsim Results</a> <a href="https://uwosh.instructure.com/courses/148508/assignments/433877">(https://uwosh.instructure.com/courses/148508/assignments/433877)</a>	due by 11pm
Tue May 7, 2019	 <a href="https://uwosh.instructure.com/courses/148508/assignments/433872">Quiz 12 - Ethics and CSR</a> <a href="https://uwosh.instructure.com/courses/148508/assignments/433872">(https://uwosh.instructure.com/courses/148508/assignments/433872)</a>	due by 11pm

Date	Details	
Tue May 14, 2019	 <a href="https://uwosh.instructure.com/courses/148508/assignments/433868">Quiz 13 -- International Considerations</a> ( <a href="https://uwosh.instructure.com/courses/148508/assignments/433868">https://uwosh.instructure.com/courses/148508/assignments/433868</a> )	due by 11pm
Wed May 15, 2019	 <a href="https://uwosh.instructure.com/courses/148508/assignments/433880">Discussions Weeks 6-14</a> ( <a href="https://uwosh.instructure.com/courses/148508/assignments/433880">https://uwosh.instructure.com/courses/148508/assignments/433880</a> )	due by 11pm
	 <a href="https://uwosh.instructure.com/courses/148508/assignments/433882">Marketing Plan Recommendation</a> ( <a href="https://uwosh.instructure.com/courses/148508/assignments/433882">https://uwosh.instructure.com/courses/148508/assignments/433882</a> )	due by 11pm
	 <a href="https://uwosh.instructure.com/courses/148508/assignments/433881">Group Participation on Marketing Plan and Capsim Teams</a> ( <a href="https://uwosh.instructure.com/courses/148508/assignments/433881">https://uwosh.instructure.com/courses/148508/assignments/433881</a> )	