

12-846  
UWUCC - App 3/12/13  
Senate - Info 3/26/13

# REQUEST FOR APPROVAL TO USE W-DESIGNATION

LSC #  
Action AP-2/21/13

## COVER SHEET: Request for Approval to Use W-Designation

### TYPE I. PROFESSOR COMMITMENT

- Professor \_\_\_\_\_ Phone \_\_\_\_\_
- Writing Workshop? (If not at IUP, where? when?) \_\_\_\_\_
- Proposal for one W-course (see instructions below)
- Agree to forward syllabi for subsequently offered W-courses?

### TYPE II. DEPARTMENT COURSE

- Department Contact Person Parimal Bhagat Phone 7-3315
- Course Number/Title MKTG 450-550 Marketing Strategy
- Statement concerning departmental responsibility
- Proposal for this W-course (see instructions below)

### TYPE III. SPECIFIC COURSE AND SPECIFIC PROFESSOR(S)

Professor(s) \_\_\_\_\_ Phone \_\_\_\_\_  
 Course Number/Title \_\_\_\_\_  
 Proposal for this W-course (see instructions below)

### SIGNATURES:

Professor(s) [Signature] (Chair, Dept. Curriculum Committee)  
 Department Chairperson [Signature]  
 College Dean [Signature]  
 Director of Liberal Studies [Signature] 5/3/13

### COMPONENTS OF A PROPOSAL FOR A WRITING-INTENSIVE COURSE:

- UWUCC Co-Chair: Gail Schust 3/12/13
- I. "Writing Summary"--one or two pages explaining how writing is used in the course. First, explain any distinctive characteristics of the content or students which would help the Liberal Studies Committee understand your summary. Second, list and explain the types of writing activities; be especially careful to explain (1) what each writing activity is intended to accomplish as well as the (2) amount of writing, (3) frequency and number of assignments, and (4) whether there are opportunities for revision. If the activity is to be graded, indicate (5) evaluation standards and (6) percentage contribution to the student's final grade.
  - II. Copy of the course syllabus.
  - III. Two or three samples of assignment sheets, instructions, or criteria concerning writing that are given to students. Limit: 4 pages. (Single copies of longer items, if essential to the proposal, may be submitted to be passed among LSC members and returned to you.)

**Please number all pages.** Provide one copy to Liberal Studies Committee.  
**Before you submit:** Have you double-checked your proposal against "The Liberal Studies Committee's Most Frequently Asked Questions"?

Received

FEB 11 2013

Liberal Studies

## CHECK LIST FOR WRITING-INTENSIVE PROPOSALS

The Liberal Studies Committee's Most Frequently Asked Questions,  
Based on the Senate Criteria for Writing-Intensive Courses

For All Writing-Intensive Courses:

Yes Are the writing assignments integral parts of the course, rather than exercises that seem tacked on artificially? Are they assignments that promise to enhance student learning?

Yes Have you considered various forms of writing such as case studies, laboratory reports, journals, letters, memos, formal essays, research articles, project or grant proposals, and so forth?

Yes Does one of your course objectives explicitly mention the improvement of writing?

Yes Will you distribute written instructions, including criteria for evaluation, for major assignments?

Yes Will students receive guidance in conceiving, organizing, and presenting written material in ways appropriate to the subject being studied?

Yes Will students produce at least 5000 words (15-20 typed pages) of writing that you evaluate? Have you clarified this by giving us the minimum number of pages that you expect for each writing assignment?

Yes Are there at least two, and preferably more, different writing assignments?

Yes Will students revise at least one assignment after receiving your review comments?

Yes Does at least one assignment require students to produce finished, edited prose (as differentiated from whatever informal or draft writing you have included)?

Yes Are written assignments (in-class; out-of-class) worth at least 50% of the course grade?

For Type I (Professor Commitment) Writing-Intensive Courses:

Yes Have you attended a writing workshop either at IUP or elsewhere? [If not, have you indicated at least equivalent preparation based on such things as graduate education, teaching experience in writing courses, publications, conference attendance, or other professional activities?]

For Type II (Departmental) Writing-Intensive Courses:

Yes Does your "statement of departmental responsibility" explain how the department will ensure that the writing component is present regardless of who is teaching? Does it identify the specific department group or individual who is responsible for ensuring this?

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INTEROFFICE MEMORANDUM

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**TO:** DR. GAIL SECHRIST, UNIVERSITY-WIDE UNDERGRADUATE CURRICULUM  
COMMITTEE

**FROM:** PARIMAL BHAGAT, CHAIR, MARKETING DEPARTMENT 

**SUBJECT:** DEPARTMENT RESPONSIBILITY STATEMENT FOR DESIGNATING MKTG 450 AS OUR  
DEPARTMENT'S WRITING-INTENSIVE COURSE

**DATE:** FEBRUARY 6, 2013

**CC:** DR. FRAMARZ BYRAMJEE, DEPARTMENT UNDERGRADUATE CURRICULUM  
COMMITTEE CHAIRPERSON

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I confirm that MKTG 450 Marketing Strategy will serve as the Writing Intensive Course in the B.S. in Marketing curriculum. I will ensure that any faculty teaching this course will follow the guidelines for Writing Across the Curriculum as set by the UWUCC and LSC.

## WRITING SUMMARY – MKTG 450 MARKETING STRATEGY

MKTG 450 Marketing Strategy is proposed for identification as a “W” course. The course is taught every semester. Because of the prerequisites, most of the students in the class will be Business students – most will be Marketing Majors and a few from other Majors in business disciplines or complementary areas including but not limited to Fashion Merchandising. The course is only for students with a senior-level standing. This course is required for all Marketing Majors.

Two major types of writing will occur in this course.

1. PROSE WRITING FOR DISCOVERY AND CRITICAL THINKING THROUGH ARTICLE CRITIQUES, CASE POSITION PAPERS AND/OR ASSIGNMENTS.

- (a) Article critiques: After reading articles in the field students will be asked to develop a critique that examines the primary theses of the article as well as other perspectives presented by the authors and provide their personal evaluative perspectives. Students will support their perspectives based on theory they have learned and/or other articles on the topic based on independent research.

Students will submit a paper one page in length. While a brief summary of the primary theses of the author(s) and their key perspective may be included, an in-depth analysis with critical comments grounded in theory and research will be expected.

Four to five article reports will be expected.

- (b) Case Reports: After reading case studies in the field students will be asked to develop a case position paper. The paper will first evaluate the marketing situation and identify key issues that require a business decision. Subsequently students will provide their response to the key issue(s) as a business decision based on theory and practice in marketing.

Students will submit a paper two page in length. After presenting their identification of the key issue(s) with a justification, a clearly communicated decision recommendation will be expected.

Six to eight case position papers will be expected.

- (c) Assignment: After covering a key topic in marketing strategy, students will be given an opportunity to demonstrate application of the concepts through an assignment. This assignment will require the student to research a concept and apply it to a real-world situation – typically, a company or brand.

Students will submit a paper one to three page in length. The outcome will depend on both personal knowledge and contextual knowledge.

## 2. TECHNICAL REPORT

- (a) **MARKETING PLAN**: Students will research and analyze the marketing program of a company following the steps of the marketing planning process and write a new marketing plan. A generic structure for the report will be provided and students will be permitted to adapt the structure to their needs as long as the expected content is covered.

This is a group assignment that will require collaborative writing. Students will be expected to write specific sections of the report individually and then bring their sections together for peer review and collaboration. The final report is expected to be seamless in style and structure.

The report is expected to be from 15-20 pages in length. Each group member is expected to write 3-5 pages, depending on group size.

- (b) **MARKETING SIMULATION REPORTS**: Working in groups, students will research and analyze the marketing information provided for their company in the marketing simulation and make decisions related to several key marketing actions spread over several simulation rounds. Students will present their logic in the choices based on theory and concepts in marketing and write a report summarizing their actions and justifications.

Students will share the responsibility in writing the reports after peer review and collaborative decision-making.

The report will be one to two pages in length per period. Eight to ten rounds of decisions are expected resulting in a total of 15-20 reports. Each student will lead in writing the report for two rounds or an average of 2-4 pages per student.

### Summary Chart for Writing Assignments\*

<b>A. Writing Assignments</b> for MKTG 450 Marketing Strategy					
Assignment Title	# of Assignments	# of total pages	Graded (Yes/No)	Opportunity for Revision (Yes/No)	Written Assignment represents what % of final course grade
Marketing Plan or Simulation	1	15-20	Yes	Yes	30%
Case Reports and Assignments	6-8	12-16	Yes	Yes	40%
Article Critiques	4-5	4-5	Yes	No	20%
<b>Totals</b>	<b>13</b>	<b>31-41</b>	<b>NA</b>	<b>NA</b>	<b>90%</b>

<b>B. Examinations</b> (Complete only if you intend to use essay exams/short answers as part of the required number of pages of writing.)			
Exams	Approx.% of exam that is essay or short answer	Anticipated # of pages for essay or short answer, or approx. word count	Exam constitutes what % of final course grade
1.			
2.			
3.			
<b>Totals</b>			

*\*Total writing assignments should contain at least 5000 words (approximately 15-20 typed pages) in two or more separate assignments; written assignments should be a major part of the final grade—at least 50% or more.*

## **SAMPLE SYLLABUS OF RECORD**

### **I. CATALOG DESCRIPTION:**

#### **MKTG 450 MARKETING STRATEGY**

3 Class hours  
0 lab hours  
3 Credits  
(3c-01-3cr)

#### **MKTG 550 MARKETING STRATEGY**

3 Class hours  
0 lab hours  
3 Credits  
(3c-01-3cr)

#### **Prerequisite:**

For MKTG 450: MKTG 320 Principles of Marketing; Senior-level standing.

For MKTG 550: MKTG 603 Marketing Management

Designed to develop marketing and business decision-making skills to evaluate real-world business situations, analyze marketing problems and scenarios, and produce solutions in the form of marketing and business strategies. Involves analyses based on quantification of marketing decisions and problem-solving scenarios using exercises and in-depth case studies which develop analytical reasoning. Integrates knowledge of marketing and other business management functions into marketing strategy development, implementation, and control using either a marketing plan or marketing simulation exercises. Readings on classic and emerging issues will provide applied perspectives of marketing in the business environment.

### **II. COURSE OUTCOMES:**

Upon completion of the course students will be able to:

#### **MKTG 450 (undergraduate students):**

1. Understand the strategic decision-making process includes developing, evaluating and choosing among alternative courses of action to solve a problem or achieve a goal.
2. Analyze marketing data and quantify theoretical concepts for problem solving and optimal decision-making.
3. Understand and apply frameworks and models of marketing strategy to decision-making.
4. Develop an integrated decision-making perspective of marketing by developing a Marketing Plan or participating in a multiple-session marketing simulation exercise.

5. ***Demonstrate improvement of writing skills by developing article critiques, case position papers and/or written assignments.***

MKTG 550 (graduate students):

In addition to the above:

6. Design a Marketing Dashboard with several marketing metrics for a marketing division of a Fortune Global 500 firm OR submit a major research paper.

The primary course outcomes will be achieved through lectures, assigned readings, case analyses, and either a marketing planning or simulation exercise. These outcomes will be integrated throughout the course as described in the course outline and evaluation methods provided below.

**III. COURSE OUTLINE:**

**A. INTRODUCTION TO STRATEGIC MARKETING DECISION-MAKING [8 hours]**

**Strategic marketing frameworks and tools  
Product-focused and Customer-focused analysis  
Overview of Marketing Metrics  
Financial Analysis for Marketing Decisions**

**INTRODUCTION TO THE CASE ANALYSIS AND DECISION-MAKING APPROACH**

**B. CUSTOMER VALUE ASSESSMENT [3 hours]**

**Approaches to measuring customer value  
Customer Lifetime Value Analysis**

**C. SEGMENTATION, TARGETING AND POSITIONING DECISIONS [3 hours]**

**Segmentation and targeting Research  
Profiling segments using qualitative and analytical methods  
Database Marketing for targeting individual customers  
Techniques for forming Perceptual Maps**

**D. FORECASTING MODELS AND METHODS [2 hours]**

**Market Demand and Trend Analysis  
Forecasting methods in marketing and business**

**E. PRODUCT AND SERVICE STRATEGIES [3 hours]**

**New Product Process and Product Management Decisions**



**Product/Service Portfolio Decisions****F. PRICING STRATEGIES [3 hours]****Pricing Product Lines****Pricing Orientation to Cost, Demand, or Competition****G. MARKETING CHANNEL STRATEGIES [3 hours]****Salesforce Territory and Allocation Decisions****Logistics Decisions****H. MARKETING COMMUNICATION STRATEGIES [3 hours]****Evaluating Creative Plans and Programs****Advertising Budget Decisions****Media Choice and Media Planning Decisions****I. COMPREHENSIVE MARKETING ANALYSIS AND STRATEGIES [12 hours]****Systems approach integrating marketing with other functional areas in business****Marketing Dashboards: Tracking Performance in real-time****PRESENTATIONS****[2 hours]****FINAL EXAM (As per IUP final exam schedule) [2 hours]**

#### IV. EVALUATION METHODS:

Your grade will reflect your performance regarding successful completion of assessment tasks such as assignments and/or case analysis with discussions. As such, the assessment tasks described below:

##### ASSIGNMENTS:

All students should complete the given assignment prior to class and submit a 1-3 page (5-page for graduate students) report (structured into key issues with recommendations; 1 ½" line spacing, 11-12 point font size, maximum 1" margins) at the time of scheduled discussion to receive credit.

Selected students will present the assignment or case and facilitate the discussion. Every student will have the opportunity to present at least one assignment or case. The use of visuals such as PowerPoint's or overhead transparencies is required.

Assignments may include exercises or project tasks pertaining to specific topics in the course.

##### ARTICLE REPORTS:

Develop a critique of article for the respective online session providing not just a summary but pros and cons of the views presented and your agreement/disagreement with each. Update the article with other outside material/sources when appropriate. Suggested length: 2 pages, 1 ½ line spacing, 11 or 12 point font. Submit in D2L under the respective Dropbox tool folder titled "Article Reports" – do not submit by email.

*Students are expected to incorporate feedback given on prior submissions into the subsequent submissions to demonstrate an improvement in their writing skills.*

##### CASE POSITION PAPER & DISCUSSION:

All six Cases are in the Case Custom Book that you may have purchased Online (see attached instructions). Prepare a one-page (1-1/2 line spacing, 11-12 point font, in Microsoft Word only). Submit in D2L under the respective Dropbox tool folder titled "Case Position Paper" – do not submit by email.

We will have an in-depth discussion of the case in class. Bring a hardcopy of your submission to class. Based on feedback on the case position paper, students will resubmit their case position paper. Your grade will be based on both your resubmitted position paper (*which should demonstrate improvement in writing skills*) and in-class discussions.

##### TECHNICAL REPORT:

Students will be writing either a Marketing Plan or Marketing Simulation Game reports,

depending on the assessment tool used by the instructor. The expectations and process for each type of technical report is given below:

Marketing Plan:

Working in groups, students will research and analyze the marketing program of a company following the steps of the marketing planning process and develop a new or revised marketing plan. ***Students are expected to learn valuable skills in collaborative writing. Students will be responsible for writing a specific section of the report (about 3-5 pages each).*** The marketing plan will be presented in class and a written report of 10-15 pages will be submitted.

Marketing Simulation:

Working in groups, students will research and analyze the marketing information provided for their company in the marketing simulation and make decisions relating to several key marketing actions spread over several simulation rounds. Students will present their logic in the choices they make in each round and write a one or two page report summarizing their justifications. ***By incorporating feedback on the previous report, students are expected to improve their writing communication skills. Each student in the group will have the responsibility of writing the report for two rounds of the simulation (about 2-4 pages each).***

Class Participation:

This item will be evaluated based on class discussions of articles and readings as well as other in-class assignments. Attendance is required for receiving credit for class participation.

Marketing Dashboard (for Graduate Students only):

Students will study one Fortune 500 firm in terms of the metrics or measures used to evaluate the company's ongoing and long-term marketing programs. Students will then create a template that comprehensively presents the metrics to be used for evaluating the marketing program.

Research Paper (for Graduate Students only):

Each graduate student will author a major research paper that will identify, evaluate, and analyze the strategic marketing practices for major organizations based upon the theories and models discussed in class.

GRADING POLICY IS AS FOLLOWS:

For MKTG 450:

ASSIGNMENTS/CASES/ARTICLE REPORTS [Objectives 1, 2, 3]	60%
MARKETING PLAN OR SIMULATION [Obj. 4]	30%
CLASS PARTICIPATION [Objective 1]	10%
	TOTAL GRADE 100%

For MKTG 550:

ASSIGNMENTS/CASES/ARTICLE REPORTS [Objectives 1, 2, 3]	60%
MARKETING PLAN OR SIMULATION [Obj. 4]	20%
MARKETING DASHBOARD/PAPER [Objective 5]	10%
CLASS PARTICIPATION [Objective 1]	<u>10%</u>

TOTAL GRADE 100%

**V. Grading Scale:**

## Sample grading scale:

For MKTG 450: A  $\geq$ 90%, B = 80%-89%, C = 70%-79%, D = 60%-69%, and F < 60%For MKTG 550: A  $\geq$ 90%, B = 80%-89%, C = 70%-79%, and F < 70%.**VI. Attendance Policy**

Class participation will be strongly encouraged. Ideas, thoughts, and opinions presented by the student during class discussions will be the primary basis for this grade. Students will reflect on various perspectives and provide critical thinking regarding relevant issues for class discussions.

**VII. REQUIRED textbooks, supplemental books, and readings:**TEXT

## Required:

1. *CUSTOM BOOK* – A Collection of Strategic Marketing Material and/or Cases compiled from the recommended texts below and from other sources including, but not limited to, cases from Harvard Business Publishing.
2. Marketing Plan software or template OR access to a Marketing Simulation software.

## Recommended:

*Strategic Marketing* by Cravens and Piercy, 9<sup>th</sup> ed., McGraw-Hill, Inc.

*Analysis for Marketing Planning* by Lehmann and Winer, 7<sup>th</sup> ed., McGraw-Hill, Inc.

*Strategic Marketing Problems: Cases and Comments* by Roger A. Kerin and Robert A. Peterson, 12<sup>th</sup> ed., Pearson Publishing.

*Marketing Strategy: A Decision-Focused Approach* by Orville Walker and John Mullins, 6<sup>th</sup> ed., McGraw-Hill, Inc.

*Marketing Metrics: The Definitive Guide to Measuring Marketing Performance*, 2<sup>nd</sup> ed., by Paul W. Farris, Neil T. Bendle, Phillip E. Pfeifer and David J. Reibstein, Pearson Education, 2010.

### VIII. BIBLIOGRAPHY:

Anderson, Eric and Duncan Simester (2003), "Mind Your Pricing Cues," *Harvard Business Review*, Vol. 81, No. 9, pp. 96-103.

Armstrong, Scott J. (2001), "Selecting Forecasting Methods," in Scott J. Armstrong, ed., Principles of Forecasting, Kluwer: Norwell, MA.

Bass, Frank M. (1969), "A New Product Growth Model for Consumer Durables," *Management Science*, Vol. 15, No. 4 (January), pp. 215-27.

Blattberg, Robert C. and John Deighton (1996), "Managing Marketing by the Customer Equity Test," *Harvard Business Review*, Vol. 74, No. 4 (July), pp. 136-44.

Davenport, Thomas H. (2006), "Competing on Analytics," *Harvard Business Review*, Vol. 84, No. 1 (January), pp. 98-107.

Dolan, Robert J. and Hermann Simon (1996), Power Pricing: How Managing Price Transforms the Bottom Line, The Free Press: New York.

Gupta, Sunil and Donald Lehmann (2005), Managing Customers as Investments: The Strategic Value of Customers in the Long Run, Wharton School Publishing: Philadelphia, PA.

Lilien, Gary L., Arvind Rangaswamy and Arnaud De Bruyn (2007), Principles of Marketing Engineering, Trafford Publishing: PA.

Lodish, Leonard M. (1974), "'Vaguely Right' Approach to Sales Force Allocations," *Harvard Business Review*, Jan.-Feb., pp. 119-25.

Nagle, Thomas T. and John Hogan (2005), The Strategy and Tactics of Pricing: A Guide to Growing More Profitably, 4<sup>th</sup> ed., Prentice Hall: Englewood Cliffs, NJ.

Simon, Herbert A. (1977), The New Science of Management Decision, Prentice Hall PTR: Upper Saddle River, NJ.

Yankelovich, Daniel and David Meer (2006), "Rediscovering Market Segmentation," *Harvard Business Review*, Vol. 84, No. 2, pp. 122-31.

## **Course Analysis Questionnaire**

### **A. Details of the Course**

- A1. This course is one of the core courses for students in the BS in Marketing Program. This course is not intended to be a Liberal Studies course.
- A2. This course does not require changes in any other course in the department. The revised BS in Marketing program includes this course among the core courses.
- A3. A similar version of this course has been offered thrice as a special topics course MKTG 481/581 Real-world Applications of Marketing.
- A4. This course is expected to be offered at the dual level.
- A5. This course is not to be taken for variable credit.
- A6. Similar courses are offered at the following institutions, among others:

DePaul University, Chicago: MKTG 534 Analytical Tools for Marketers; MKTG 540 Strategic Planning: Developing Sustainable Business Models; MKTG555 Decisions in Marketing Management;

Cleveland State University, Cleveland: MKT 604 Strategic and Tactical Marketing.

Florida Atlantic University, Boca Raton: MAR 4803 Marketing Strategy.

Wharton, University of Pennsylvania, Philadelphia: MKTG277 Marketing Strategy.

- A7. No professional society, accrediting authority, law or other external agency recommends or requires the content or skills of this proposed course.

### **B. Interdisciplinary Implications**

- B1. This course will be taught by one instructor.
- B2. The content of this course does not overlap with any other at the University.
- B3. This course is not cross-listed.

**C. Implementation**

- C1. No new faculty member is required to teach this course. The assigned instructor will adjust his or her schedule to allow for this course. This course will be counted as one preparation and three hours of equated workload.
- C2. Other resources:
- a. Current space allocations are adequate to offer this course.
  - b. No special equipment is needed for this course.
  - c. No laboratory supplies are necessary for this course.
  - d. Library holdings are adequate.
  - e. No travel funds are needed for this course.
- C3. No grant funds are necessary to provide supplementary materials.
- C4. This course will be offered every semester.
- C5. At least one section will be offered at a time in a regular semester.
- C6. Being a writing-intensive course for the department, up to 35 students can be accommodated in this class in which students do a considerable amount of planning, analysis, writing and development.
- C7. No professional society recommends enrollment limits or parameters for this course.
- C8. This course does not currently involve the use of distance education {upon approval of this course for in-class instruction, the necessary documentation will be submitted for its online delivery}.

**D. Miscellaneous**

No additional information is necessary.

## **GUIDELINES FOR CASE ANALYSIS**

This handout provides some guidance into case analysis, discussion, reporting, and presentation. There is no one way to approach a case analysis. However, understanding the central purpose of case analysis – to apply textbook theory in a real-world situation – should be the outcome we all should look for.

### ***WHY CASES?***

1. Help you develop an insight into what managers or decision-makers face in a business and what they should or should not do.
2. Hone your analytical and inference-making abilities.
3. Evaluate the company's internal and external environments, spotting trends which may be challenges or opportunities for the company.
4. Help you identify key (strategically relevant) problems or issues and distinguish these from symptoms of failure or success.
5. Provide practice in applying various theoretical frameworks and analysis tools discussed in this class and all previous classes with the intention of clarifying the problem or issue.
6. Provide an opportunity for exercising judgment through your recommendations and actionable decision suggestions.
7. Provide a forum to defend your viewpoint before your peers and experts and thereby hone your oral and written communication skills.

## **PREPARING A CASE REPORT FOR PRESENTATION AND DISCUSSION**

Following are suggested steps to analyze cases in almost any business discipline. The percentages estimate relative importance an instructor may place on each section/step of the Case Report and should be reflected in the written report.

### **Step 1: Case Overview/Situation Analysis (10%)**

- Skim case once to get a gist of the context.
- Next, read thoroughly keeping any study questions given in front of you or, if none are given, begin formulating some study questions or key issues at this time.
- Review and summarize relevant and critical information from the exhibits in the case.

### **Step 2: Problem(s) Formulation: Identifying key issues/problems/challenges. (20%)**

- Develop a SWOT table as it pertains to marketing.
- Identify several issues, arrange them hierarchically under topics, sift through them to differentiate between strategic *problems* and *symptoms* of problems. A rule-of-thumb to identify problems and not symptoms is to understand their underlying *cause-and-effect relationships*. Higher-order causes would be considered problems.
- For an in-depth analysis and if constrained by the length of the report, it is always advisable to address only ONE or TWO strategic issues in one report. This allows you provide an in-depth analysis and your recommendations to be more actionable.

### **Step 3: Analysis (40%)**

- Apply the concepts, theoretical frameworks, analysis tools, and other techniques covered in the course. Your analysis cannot be your opinions alone: They need to be justified by theory and, thereby, withstand critique.



- Analyze both numerical information and verbal information presented in exhibits. Do not feel required to use information from all exhibits: Several exhibits may not be relevant to the issue you have chosen to analyze.
- If working in a group, test your analysis and opinions on your peers, get their perspectives, and arrive at a consensus analysis.

Step 4: Recommended Actions (30%)

- Provide a set of concrete recommendations and a plan of action. This set of recommendations should provide a reasonable and actionable solution to the issue identified. While preparing this plan of action, consider: available financial and human resources; current and future business environment; competitive reactions; customer acceptance; and timeline for implementation.
- Support your recommendations with evidence either from the case or other sources. Consider ethics, global issues, and technological advances in all your decisions.

## **SAMPLE MARKETING PLAN EVALUATION GUIDELINES**

### **EXECUTIVE SUMMARY**

#### **COMPANY DESCRIPTION**

Descriptive background of the company given? Current update given?  
Secondary data/information attached?

#### **STRATEGIC FOCUS & PLAN<sup>1</sup>**

Mission statement and company goals given? CSR and stakeholder perspectives considered?

#### **SITUATION ANALYSIS**

Detailed SWOT analysis table included? Inferences made?  
Industry Analysis: evidence of secondary sources used?  
All relevant competitors compared, preferably using a table?  
Company Analysis as it pertains to marketing the focal product line?  
Customer Analysis: customer behavior, decision-making, and influences covered?

#### **MARKET-PRODUCT FOCUS**

Current/new products serving current/new markets?  
Market- product grid or table listing all segments (markets) in the industry and all products the company makes serving the various segments.  
Demand Forecasting?  
Basis for Segmenting markets, Target Market profiles, target marketing strategy, and positioning strategy.  
A hypothetical competitive positioning map for selected competitors given?

#### **PRODUCT STRATEGY**

Classified product and discussed implications of the classification on marketing?  
Product Mix analysis?  
Unique product features/attributes/quality listed?  
Branding issues.  
New product innovation strategy?

#### **PLACE**

What marketing channels of distribution are being used? Discuss the Value Chain and Retailing, if applicable.

#### **PROMOTION**

What are the objectives of promotion for the company/brand? Justify.  
List all promotional mix elements the company currently uses in a table with vehicle objective, media integration and costs. Include examples as applicable in the appendix of report.  
What NEW creations has the group designed?

#### **PRICING**

What pricing objectives does the company use? Justify. Profitability analysis.

#### **STRATEGIC IMPACT OF YOUR PLAN: IMPLICATIONS FOR IMPLEMENTATION, CONTROL AND GROWTH.**

#### **APPENDICES**

Works cited  
Relevant documentation to support your plan

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<sup>1</sup> Provide appropriate marketing metrics throughout the report. Evaluate all plans from a marketing sustainability (environmental, social and economic impact; ethical considerations) perspective. Assess the technological and global impact of every decision or action you recommend.