

COURSE INFORMATION

Division: Marketing

Section 001: 2pm-3:50pm, M/W, in HA 132

Course Duration: Nov 1 – Dec 11 2021

Section 002: 10am-11:50am, M/W, in HA 133

Final: Within Dec 6-11 inclusive, time/place determined by Graduate Programs office



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Office hours: Mondays 12-12:45, in-person, appointment and drop-in. Tuesdays 10-11:30, online, appointment and drop-in. Wednesdays 7-7:45pm, online, appointment only. Friday 10-11, online, appointment only. Make appointments at www.calendly.com/ubcmktgprof

Office location: HA564

Social Media: LinkedIn <https://www.linkedin.com/in/annmariestone/> , Twitter [ann_m_stone](https://twitter.com/ann_m_stone)

COURSE GOALS AND DESCRIPTION

This course is designed to give you hands-on experience with concepts, analytical techniques and best practices that managers use to make marketing strategy decisions. The concepts taught in this course will enable you to develop effective marketing strategies across a wide range of product & service industries, including Business-to-Business (B2B) and Business-to-Consumer (B2C) markets. The course uses real-world case studies to give you practice applying the techniques and making decisions. In summary, the course is focused on developing your analytical and critical thinking skills and developing your ability as a manager and decision maker.

COURSE FORMAT (if COVID-based adjustments are required for our safety this format will be retained)

Our coursework together follows this pattern:

- **Canvas Prep Page (within the Canvas day module):** which may include readings, videos, and other sources to deliver concepts. This is often supplemented with a case to allow for the immediate application of those concepts to a business situation. This page is your detailed prep work and it needs to be reviews and activities completed prior to class time. There is usually a quiz associated with each day; make sure this is completed prior to 9:59am on class days.
- **Synchronous class time to discuss the core concepts.** These focus heavily on the Canvas Prep Page Materials. Our time together is not about one-way teaching; it is about discussing, challenging, and sharing our thoughts and ideas for greater comprehension and understanding of the subject(s) of the day. Come to class with ideas and questions about your pre-class materials. On case days, bring your analysis and application of course concepts to the case with you as stimulus to dig further into the information. You will likely be asked to work in a smaller team to allow for a more open exchange of ideas; those will sharpen your thinking and inform the larger class conversation.
- After-class materials, posted as a “Post Class” page in the module, which will include the slides used in class but also include optional materials to enhance your learning for those interested.

LEARNING OBJECTIVES

After taking this course, you will be able to understand the activities and decisions involved in developing a marketing strategy. Specifically:

- Market segmentation and target market selection decisions
- Product/service positioning decisions
- Pricing decisions
- Distribution decisions
- Communication decisions
- The development of a marketing plan

ASSESSMENT SUMMARY

| Evaluation | Specifics | Points | Graded as: |
|------------------------------------|---|------------|--------------|
| Class Participation and attendance | <ul style="list-style-type: none"> • Classes 1-5 feedback: 7 pts • Classes 6-10 feedback: 8 pts | 15 | Individual |
| Active Learning | Various activities, most between .5 pts to 3 points, generally prior to each class, includes in-class activities. | 15 | Individual |
| Team Case Analysis | You will receive some additional data from beyond the case we cover in class to refine your segmentation | 15 | Team* |
| Marketing Plan presentation | During our assigned Exam period you will present your recommendations for a case situation shared | 25 | Team* |
| Marketing Math exercise | You will be asked to log into Canvas, access an online “quiz” and complete it within 60 minutes | 15 | Individual |
| Case submission | You will be asked to prepare a case overview and submit it for review | 15 | Individual |
| | | 100 | Total |

*Team marks will be adjusted, if required, from feedback in the peer review process, see below as the last point of assessment details

ASSESSMENT DETAILS

Class Participation

Active engagement in the class conversation is an expectation. To assist in this process, students are asked to sit in the same seat each class so that a visual schematic for notetaking during the class period may be developed. There will be a mid-term progress grade provided after Class 5 and a final grade is delivered after Class 10.

Participation is a combination of attendance and active vocal contributions to the class.

Attendance awarded daily out of 1 possible points:

| Points | Explanation of mark awarded |
|--------|---|
| 0 | Absent or 30+ minutes of missed class |
| .25 | 29 minutes or less of missed class with no communication. |
| .5 | 29 minutes or less of class missed; with an understandable well communicated rationale. Communication is key; mark is flexible based on issues faced. |
| 1 | Present, engaged |

Participation awarded daily out of 10 possible points:

| Points | Explanation of mark awarded |
|--------|---|
| 0 | No participation |
| 3 | Contributions which are substantively derivative, questions to reiterate or confirm information, general comments. This is also the expected points for answering a question directed to you (although higher marks may be awarded) |
| 6 | Volunteered contributions which build the conversation and show significant preparation and/or reflection upon the topic at hand. |
| 8-10 | Comments of significant originality or insight. Tracked by your instructor; I confer after class with the TA and award these larger amounts. |

Points are totaled for each mark; they are used to rank the class and award point values to your work relative to the contributions of others in the class.

To encourage a wide range of voices in our highly participative class, the following techniques will be utilized:

- Random acknowledgement of those wanting to share. Generally, the first hands in the air are those that are called on. That technique, however, is not fair for those who need a little time to collect their thoughts and prepare them to share. The instructor will call on hands in a more random order to be fairer to the various learning styles in the room.
- Not everyone will be called on; time constraints exist on every topic.
- *Emails after class count as participation.* Sometimes the “right idea” comes after class, or you don’t get called on, or you’re just not comfortable speaking in class that day. For these instances and others, emails to the course instructor within 48 hours of the class time will be considered for participation. The amount of the point value will not be as high as if it was shared in class because *if you share it in class we all learn from you, if you share it with the instructor only one person learns.* A 6 point in-class comment may be a 3 if emailed; that said, it is far better to send it in than leave the thought unshared and not receive credit for having had it.
- *Participation email format:*
 - To: ann.stone@sauder.ubc.ca
 - Subject: BAMA550-00x Participation for Class x

Active Learning: Day by day quizzes, in-class activities

Quizzes may be accessed in Canvas on each Day’s Module (using Module to navigate into the Day). Some in class activities will generate a worksheet which will be handed in. These will cumulatively add to up to your Active Learning Mark. Note: The math is (your score/possible points) * 15. You will be able to track every Active Learning activity and mark within Canvas to track both your score and possible points.

Team Case Analysis

There is one team submitted case. The preparation of this memo will be similar to courses already taken. Check Canvas for the due date/time; see “missed or late assignments” below to insure that these are on time. There will be a more complete assignment outline posted on Canvas as well as a marking rubric; use this as your primary guidance on this assignment.

This case is a closed case, meaning that you will use only the information available to you through the case to create your solution. Cases which exhibit material not available in the case will lose ½ of the points for the assignment.

Marketing Plan Presentation

Your assigned team will be given a comprehensive marketing plan case and will deliver a 10-minute marketing plan presentation in which you outline a marketing strategy and the analysis behind it. Presentations will be followed by a 5-minute Q&A period with the instructor. The format of your presentation is up to you but it should involve all team members and clearly outline the decisions and reasoning for each element of the marketing plan: 1. Segmentation Analysis and Target Market Selection, 2. Product Positioning, 3. Pricing Strategy, 4. Distribution, 5. Marketing Communications.

Presentation times for each team will be determined randomly; the resultant schedule will be posted on Canvas. Teams will be evaluated using the rubric presented on the assignment in Canvas; use this criteria to guide the development of your presentation.

Marketing Math Exercise (delivered during class time in Class 8)

This is a 60-minute exercise. It is based off some tests used in industry to evaluate the analytical skills of marketing managers. It tests basic math and logical reasoning skills relevant for marketing analysis (e.g., calculating margins, market share, market growth rates, break even analysis, interpretation of market data, etc.). I include it in the course to evaluate analytical ability and to prepare students for the analyses they will be expected to perform in the real world.

Case submission

There is one individual case submission. You will use skills learned in prior classes and within this class to write a short memo using case material only to deliver your thoughts on questions posed about the case facts. You will work on this independently; originality checks will be conducted.

Peer review

A peer evaluation tool will be deployed twice during this course – once after the team Ford Ka Segmentation Exercise and again after the Marketing Plan Presentations. Each student will be evaluated anonymously by their team members on the criteria shown on the form (this includes assessing your own contributions to the team activity). The question the peer evaluation asks is simple: all things considered, what percentage of the team's grade does the individual deserve? I evaluate these responses. Only responses supported with facts as to why the scores were awarded are considered. If multiple team members report a team member has not contributed at the expected level, average peer score for that student is multiply it by the team's grade to arrive at the student's grade. For example, if a team receives a grade of 80% (an A-) and a member of the team receives an average peer score of 75% from their team members, that team member's individual grade will be 75% x 80% = 60% (a "C" rather than an "A-").

LEARNING MATERIALS

Required Coursepack Purchase: <https://www.iveypublishing.ca/s/ivey-coursepack/a1R5c0000F1oG6EAJ/bama550001-002> is the link to this coursepack.

Other Required Reading: Available on Canvas or Canvas->Library Online Course Reserves (left hand nav)

Optional material: A complete listing of other books I have found useful in my business career may be found at blogs.ubc.ca/annmariestone (no CWL required).

COURSE SPECIFIC POLICIES AND RESOURCES

Missed or late assignments

Late submissions will not be accepted and will receive a grade of zero. That said, communicate with me directly via email if potentially extenuating circumstances occur; the chances of assisting these unusual situations is enhanced the faster everyone is aware of them.

Academic Concessions

If extenuating circumstances arise, please contact the RHL Graduate School program office as early as reasonably possible, and submit an [Academic Concession Request & Declaration Form](#). If an academic concession is granted during the course, the student will be provided options by RHL, or by the instructor in consultation with RHL, per [UBC's policy on Academic Concession](#).

Grading scale and average

This course will be marked to the Sauder School of Business grading policies for Master's level courses, as documented through the Dean's office. The expected class mean is a 78%. It is important to note that the letter grading scale anticipates that all letters are utilized in order to fully recognize academic accomplishment.

Weighting of Assignments:

The instructor reserves the right to reweight the course assignments if required impacting all students equally. Re-weighting of course elements does not occur for individual students except for academic concessions.

Grading questions; requests for regrades

Students are responsible for monitoring their own progress of points/assignments on Canvas. Questions on any points awarded should be raised within 7 days of the posting of the grade. Please handle these via email, subject line should be "Question concerning x mark". After 7 days, the grade is considered final for that assignment/activity (items under review are not included in this constraint).

Canvas submissions of work

Assignments will be submitted on Canvas and will be evaluated with turnitin.com as well as other sharing sites for originality.

Feedback

I will make every effort to return assignments as quickly as possible; I grade several items personally to provide coaching. This process does require significant time; your patience is appreciated.

Recognize that feedback comes in many ways and comments on your work are but one source. In each class, you will be treated to almost two hours of conversation about the topics of the day. You should be comparing your thinking from the pre-reading and your work experiences on how your ideas compare to your classmates' and the instructors'. This second type of feedback is the skill you will need in the workplace as written comments and a grade is a rare occurrence.

Ear buds

Ear buds are not permitted at any time in the classroom. It is the student's responsibility to remove them prior to the start of class. Ear buds left in-ear result in a participation mark of zero for the day.

Written Language Requirements Individual Submissions

Everything students deliver in this class is to be written in clear, grammatically correct English. Great ideas written poorly receive poor grades as do poor ideas written well. In a fast-paced business world, the ability to convey ideas with clarity and conviction is imperative.

Written Language Requirements Team Submissions

These are the same as individual submissions, with the addition of this instruction: the role of editor is to compile the work created separately by each teammate and creating a cohesive document that reads as if it was written by one person. *The editor role is not to correct grammar.* If editors are reworking contributions to fix grammar, this feedback is encouraged in peer reviews. An individual grade for any team submission may be reduced if others report they were required to correct basic grammar issues to craft a final submission.

POLICIES APPLICABLE TO COURSES IN THE ROBERT H. LEE GRADUATE SCHOOL

Attendance

Excepting extenuating circumstances, students are expected to attend 100% of their scheduled class hours. Absent students limit their own academic potential, and that of their classmates, and cause unnecessary disruption to the learning environment. Students missing more than 20% of the total scheduled class hours for a course (including classes held during the add/drop period) without having received an academic concession will be withdrawn from that course. Withdrawals, depending on timing, could result in a “W” or an “F” standing on the transcript.

COVID-19 Policies for Attendance & Academic Concessions

If a student feels unwell, they should stay home and send a courtesy email to each impacted instructor and cc their program manager. The student should also submit an [Academic Concession Request and Declaration Form](#).

If a student suspects possible Covid-19 infection, they should use the BC Ministry of Health’s [self-assessment tool](#), to help determine whether further assessment or testing for COVID-19 is recommended.

If a student is required to self-isolate (e.g., while waiting for test results), they should follow the steps above (stay home, email instructor(s) and program manager, submit an [Academic Concession Request & Declaration Form](#), and follow BC Health Guidance.

Students who are required to quarantine, should get in touch with their Program Manager to discuss the possibility of academic concessions for each impacted course. The Program Manager will work closely with your instructors to explore options for you to make up the missed learning.

COVID-19 Safety in the Classroom

Masks: Masks are **required** for all indoor classes, as per the BC Public Health Officer orders. For our in-person meetings in this class, it is important that all of us feel as comfortable as possible engaging in class activities while sharing an indoor space. For the purposes of this order, the term “masks” refers to medical and non-medical masks that cover our noses and mouths. Masks are a primary tool to make it harder for Covid-19 to find a new host. You will need to wear a medical or non-medical mask for the duration of our class meetings, for your own protection, and the safety and comfort of everyone else in the class. You may be asked to remove your mask briefly for an ID check for an exam, but otherwise, your mask should cover your nose and mouth. Please do not eat in class. If you need to drink water/coffee/tea/etc, please keep your mask on between sips. Please note that there are some people who cannot wear a mask. These individuals are equally welcome in our class.

Seating in class: To reduce the risk of Covid transmission, please sit in a consistent area of the classroom each day. This will minimize your contacts and will still allow for the pedagogical methods planned for this class to help your learning.

Visit the following website for the most recent updates regarding Covid-19 protocol on campus:

<https://students.ubc.ca/campus-life/returning-to-campus>

Punctuality

Students are expected to arrive for classes and activities on time and fully prepared to engage. Late arrivals may be refused entry at the discretion of the instructor or activity lead. Students arriving later than halfway through a scheduled class will be treated as absent for that class.

Electronic Devices

In-Person Regulations

Devices such as laptops, tablets, and cell phones are not permitted to be used in class unless directed by the instructor for in-class activities. Students who do not follow the School’s policy in this regard may be required to leave the room for the remainder of the class, so that they do not distract others. Research shows that students’ use of laptops in class has negative implications for the learning environment, including reducing their own grades and the grades of those sitting around them.

On-Line Lecture Regulations

During online lectures, students are not permitted to use any electronic devices other than the primary one used for attending the online lecture (e.g. laptop or desktop). Only Zoom should be open during the online lecture unless an instructor advises the use of another program/website for an in-class activity. Feedback from students indicates that personal devices are the number one distraction from effective learning and participation in the online learning environment.

Citation Style

Please use the American Psychological Association (APA) reference style to cite your sources.

Details of the above policies and other RHL Policies are available at:

<http://www.calendar.ubc.ca/vancouver/index.cfm?tree=12,199,506,1625>

UNIVERSITY POLICIES AND RESOURCES

UBC provides resources to support student learning and to maintain healthy lifestyles but recognizes that sometimes crises arise and so there are additional resources to access including those for survivors of sexual violence. UBC values respect for the person and ideas of all members of the academic community. Harassment and discrimination are not tolerated nor is suppression of academic freedom. UBC provides appropriate accommodation for students with disabilities and for religious observances. UBC values academic honesty and students are expected to acknowledge the ideas generated by others and to uphold the highest academic standards in all of their actions. Details of the policies and how to access support are available on the UBC Senate website at <https://senate.ubc.ca/policies-resources-support-student-success>.

Respect for Equity, Diversity, and Inclusion

The UBC Sauder School of Business strives to promote an intellectual community that is enhanced by diversity along various dimensions including status as a First Nation, Metis, Inuit, or Indigenous person, race, ethnicity, gender identity, sexual orientation, religion, political beliefs, social class, and/or disability. It is critical that students from diverse backgrounds and perspectives be valued in and well-served by their courses. Furthermore, the diversity that students bring to the classroom should be viewed as a resource, benefit, and source of strength for your learning experience. It is expected that all students and members of our community conduct themselves with empathy and respect for others.

Academic Integrity

The academic enterprise is founded on honesty, civility, and integrity. As members of this enterprise, all students are expected to know, understand, and follow the codes of conduct regarding academic integrity. At the most basic level, this means submitting only original work done by you and acknowledging all sources of information or ideas and attributing them to others as required. This also means you should not cheat, copy, or mislead others about what is your work. Violations of academic integrity (i.e., misconduct) lead to the breakdown of the academic enterprise, and therefore serious consequences arise and harsh sanctions are imposed. For example, incidences of plagiarism or cheating may result in a mark of zero on the assignment or exam and more serious consequences may apply if the matter is referred to the President's Advisory Committee on Student Discipline. Careful records are kept in order to monitor and prevent recurrences.

Academic Freedom and Students Studying from Outside Canada

During this pandemic, the shift to online learning has greatly altered teaching and studying at UBC, including changes to health and safety considerations. Keep in mind that some UBC courses might cover topics that are censored or considered illegal by non-Canadian governments. This may include, but is not limited to, human rights, representative government, defamation, obscenity, gender or sexuality, and historical or current geopolitical controversies. If you are a student living abroad, you will be subject to the laws of your local jurisdiction, and your local authorities might limit your access to course material or take punitive action against

you. UBC is strongly committed to academic freedom, but has no control over foreign authorities (please visit <http://www.calendar.ubc.ca/vancouver/index.cfm?tree=3,33,86,0> for an articulation of the values of the University conveyed in the Senate Statement on Academic Freedom). Thus, we recognize that students will have legitimate reason to exercise caution in studying certain subjects. If you have concerns regarding your personal situation, consider postponing taking a course with manifest risks, until you are back on campus or reach out to your academic advisor to find substitute courses. For further information and support, please visit: <http://academic.ubc.ca/support-resources/freedom-expression>

Copyright

All materials of this course (course handouts, lecture slides, assessments, course readings, etc.) are the intellectual property of the instructor or licensed to be used in this course by the copyright owner. Redistribution of these materials by any means without permission of the copyright holder(s) constitutes a breach of copyright and may lead to academic discipline and could be subject to legal action. Any lecture recordings are for the sole use of the instructor and students enrolled in the class. In no case may the lecture recording or part of the recording be used by students for any other purpose, either personal or commercial. Further, audio or video recording of classes are not permitted without the prior consent of the instructor. Students may not share class Zoom links or invite others who are not registered to view sessions.

Acknowledgement

UBC's Point Grey Campus is located on the traditional, ancestral, and unceded territory of the x^wməθk^wəyəm (Musqueam) people, who for millennia have passed on their culture, history, and traditions from one generation to the next on this site.

Online teaching tool & Requirements, if required

This course might be taught using Zoom for synchronous classes and will be used for office hours. For this course, you are required to use a Zoom account during synchronous classes and office hours. If you do not have a Zoom account, you can create one here: <https://zoom.us/signup>. Note: creating a Zoom account requires that you provide a first name, last name, and email address to Zoom. For privacy purposes, you may consent to using your existing email address and your real name. Alternatively, if you prefer, you may sign up using an alternative email address and an anonymized name that does not identify you (i.e. Jane Doe, jane.doe@email.com). If you have trouble creating an account, or accessing a Zoom session, please contact CLCHelp@sauder.ubc.ca. You will be required to provide the email address associated with your Zoom account in a Canvas quiz for identification purposes.

To help replicate the classroom experience, make sessions more dynamic and hold each person accountable, both students and instructors are required to have their cameras on during Zoom sessions. Students who require an accommodation with regard to the "camera on" requirement must contact their instructors in advance of the first class to discuss options. As professional graduate students, students are expected to conduct themselves professionally by joining sessions on time, muting mics when not speaking, refraining from using any other technology when in-session, attending in business casual dress (at a minimum), and participating from a quiet environment. Content from synchronous sessions will be selectively recorded per instructor discretion and made available to students on Canvas for a maximum duration of the course length. This is done to allow students the opportunity to return to lecture content to solidify learnings.

COURSE SCHEDULE

See next page

| # | Date | Day | Key Topic Focus | Required Prep, CP Coursepack | Active Learning | Pts | Individual Work | Team Activities | Pts |
|----|--------|-----|---|---|------------------------------------|---------------------------|---------------------------------|-----------------------------|-----|
| 1 | 1-Nov | Mon | 1) Introduction to the course, your instructor, and the importance of marketing 2) Marketing plans, your final project 3) importance of environmental analysis 4) Teams shared | 1) Framework for Marketing Strategy Formation, coursepack 2) Read Bel Brands Laughing Cow LOCR | Pre-class Quizzes | | | learn your teammates | |
| 2 | 3-Nov | Wed | 1) Value Propositions 2) How to write them 3) How to do them B2B | 1) Market Segmentation, Target Market Selection and Positioning, Coursepack 2) Review Bel Brands Laughing Cow LOCR | Pre-class quiz | | | | |
| | 7-Nov | Sun | | | 11:59pm hand in positioning strmts | | | | |
| 3 | 8-Nov | Mon | 1) What positioning did you come up with 2) what if value props and positioning was all wrong? Why Moon's <i>designations are so important</i> | 1) Hostility from <u>Different</u> LOCR 2) Break Free from the Product Life Cycle, LOCR | Pre-class quiz | | | | |
| 4 | 10-Nov | Wed | STP Case: Ford Ka | 1) Read Ford Ka, Coursepack 2) Answer case questions found on Canvas; come with them prepared for discussion | Pre-class quiz | | | | |
| 5 | 15-Nov | Mon | 1) Pricing challenges 2) The London 2012 Olympic Games | 1) Read Pricing Decisions (in section 2.4 Action Plan), Coursepack 2) Read London 2012, Coursepack 1) Read: Note on low tech mktg math, Coursepack 2) Complete Marketing math practice questions | Pre-class quiz | | Your Ford Ka Case is due 8:00am | 15 | |
| 6 | 17-Nov | Wed | Marketing Math Lots of in-class practice challenges | | Marketing Math practice questions | | | | |
| | 19-Nov | Fri | | | | Classes 1-5 participation | 7 | | |
| 7 | 22-Nov | Mon | Sagacity Tea Pricing challenges continued | 1) Read Decoding Dynamic Pricing Strategy, LOCR 2) Sagacity Tea, Coursepack | | | | | |
| 8 | 24-Nov | Wed | 1) first hour of class timed marketing math quiz 2) Distribution | 1) Read Designing Channels of Distribution, Coursepack | | | Marketing Math In-class quiz | 15 | |
| 9 | 29-Nov | Mon | x | 1) Read Marketing Communications, TBD short case, LOCR | Pre-class quiz | | | | |
| 10 | 1-Dec | Wed | 1) Case review this day 2) is marketing supposed to be ethical? | 1) Read Metabical case, Coursepack 2) Answer case questions found on Canvas; come with them prepared for discussion | | | Metabical case due | 15 | |
| | TBD | | Come to the assigned room and deliver your marketing plan presentation | | | | Classes 6-10 participation | Marketing Plan Presentation | 25 |
| | | | Items in green correlate to the Assessment summary section of the syllabus | | Active learning points* | 15 | Individual Total | Team Total | 40 |
| | | | | | | | Individual Total | Course Total | 100 |

*Calculated as: (Your Active Learning Points/Total Active Learning Points Possible) * 15