Marketing Management

MKTG 5150.080

Fall 2023 8W1

Professor:

David Strutton, Ph.D. Professor of Marketing

Office and Hours:

I am available via email, prearranged Zoom sessions, and face-to-to-face meetings by appointment. Use the email facility in **Canvas.**

E-mail: David.Strutton@unt.edu. Only use this e-mail address if you cannot reach me via the Canvas e-mail facility. Use the '" Inbox" selection on the menu bar (left side of the Canvas window). E-mail traffic initiated via Canvas is direct to all instructors and is specifically flagged to get my attention. Do not expect staff to respond to e-mail traffic on weekends or after 5:00 p.m. on weeknights. As a primary instructor, I am often online during these times, but there are no guarantees with my extensive travel schedule this Summer. I do not require associate instructors (if assigned) to be online after that time. Plan accordingly.

Required Texts

Both of the following texts are required:

- Philip Kotler and Kevin Keller, *A Framework for Marketing Management*, 6th ed. (Upper Saddle River, NJ: Pearson Education, 2016). ISBN-13: 978-0133871319, ISBN-10: 0133871312. The text is available via the UNT bookstore.
- Kenneth Thompson and David Strutton, **Applied Marketing Management: Text and Cases.** Dubuque, IA, Kendall Hunt, 2023) ISBN 9798765792438 [1]

The custom text is available only in digital format and can be purchased directly from the publisher, Kendall Hunt. The URL is https://he.kendallhunt.com/product/marking-management-cases.

You can also purchase the custom text from the UNT bookstore. The custom text is listed by the bookstore as follows:

APPLIED MARKETING MGMT:TEXT+CASES

By Thompson, Publisher: K/H
ISBN 13 : 9798765792438 [1]

When ordering your copy of the custom text from the bookstore, select "in-store pickup" instead of "shipping" to obtain your access code. **Your code will be emailed to you automatically. Be sure you provide a good email address with your order**. Choosing in-store pickup will also save you the shipping cost.

This is a manual process. If you don't receive the email within a couple of days, just call or email the bookstore to have the code emailed.

Contact information is:

Abel Montoya
Textbook Manager
Barnes & Noble 8085
University of North Texas
940-565-3193
unt.bncollege.com

Course Overview

The purpose of this course is to provide an overview of marketing management with special emphasis on the marketing mix, target marketing, and marketing strategy. The course is fundamentally a case course. Cases are selected to highlight important marketing concepts and provide students with experience grappling with decisions commonly encountered by practicing marketing managers.

Course Objectives

Upon completion of this course, you will be able to:

- Describe the major functions performed by marketing managers.
- Employ marketing management principles and practices to solve common marketing problems.
- Translate marketing decisions into their financial consequences for firms.
- Apply common marketing metrics to aid decision-making.
- Professionally communicate solutions to marketing problems both orally and in writing.

Course Policies

Student participation is mandatory. Even though this is an online class, you cannot be a passive participant. You must stay on top of all materials and actively participate in all assigned discussion groups. **Failure to make significant contributions to your group's assigned discussions will result in substantial grading penalties.**

Check Canvas for e-mails (messages) and 'announcements' daily. You should log in at least once per day during the week to make sure you are cognizant of current information and assignments. I make extensive use of "announcements" in this course. The Canvas announcement tool is a great way to provide additional guidance and clarification on course procedures and materials. Check for announcements daily!

Deadlines for assignments and exam closing dates. Deadlines are strictly enforced. This is particularly critical concerning online exams and case submissions. Do not postpone completing the online exams until the weekend the exams close. Canvas is notorious for crashing when there is a pending deadline. **I will not reset exams if this happens on Friday, Saturday, or Sunday just before the exam's scheduled closing.**

Grading

Your grade will be determined based on the following:

Case Reports (2,400 points)

The primary focus of this course is case analysis and discussion. The cases are taken from Kerin and Peterson's "*Strategic Marketing Problems*". Four cases are analyzed in this course. Each case is worth **600 points**. The list of specific cases assigned and their due dates are contained in Table 1 below. Case reports must be submitted on time. Cases submitted after, but within 24 hours, of the due date will be docked 10%. However, this rule applies only if there have been no posts to the case discussion group to which the student has been assigned. Cases submitted after the 24-hour cutoff or after the first discussion entry has been posted, whichever comes first, will be marked as missed and will receive no credit. I will not even look at these missed submissions. The appendix contains instructions for formatting your case reports.

Case Brainstorming Discussion Groups

Brainstorming discussion groups have been created for each case. Using these discussion groups is optional; however, your participation is strongly advised. These discussion groups are intended to encourage the exchange of ideas and provide a mechanism for sharing case-related thoughts and resolutions to problems you may encounter as you examine the assigned cases. Instructors generally engage in these discussions, providing additional direction for each case. THERE ARE GREAT HINTS IN THESE DISCUSSIONS FOR DOING WELL ON THE CASES. All discussion groups can be accessed via Canvas in **Folder 1: Case Brainstorming Discussion Groups.**

KK Quizzes (580 points) & Syllabus Quiz (50 points)

Eighteen (**18**) chapter quizzes at **30** points each = **540** points over the 18 chapters from the Kotler and Keller chapters of the text. There is also a 19th quiz over the contents of this syllabus, the Zoëcon grading rubric, the structure of the course website, and the sample Americana Hotels Case. The syllabus quiz is worth **50** points.

The quiz over this syllabus is due the first week of class (see Table 1 below). The objective of the quiz is to ensure everyone understands the major policies and guidelines contained therein. This quiz also examines your understanding of the sample Americana Hotels case and my presentation governing the role of decision factors in case analysis. The primary focus of the American Hotels case is to ensure that you have grasped the basic requirements for analyzing cases, are exposed to the importance of financial information for case analysis, and thoroughly understand my expectations concerning formatting your case reports.

The remaining 18 online quizzes cover material assigned from the Kotler and Keller "A Framework to Marketing Management" text. I recommend that you complete the quizzes as soon as possible. Reading the KK chapters early in the course provides additional perspectives for the casework. The material in the KK chapters is not directly relevant to the cases. However, these chapters often constitute students' first exposure to basic marketing management. In my experience, many students have not taken a basic marketing course (MKTG 3650 or MKTG 5000) before attempting MKTG 5150, even though basic marketing is a prerequisite. As a minimum, these chapters provide an excellent review of basic marketing from a management perspective.

All quizzes are available now for completion. You are allowed two attempts for each of the 18 quizzes over the Kotler and Keller material. You keep the average of the two grades. You are allowed only one attempt for the syllabus quiz. **Note that all quizzes close at specific times in the course. If you miss the deadlines, you will receive no credit for any quizzes missed.** Plan your time accordingly.

Financial Exercises (200 points)

The first assignment in the class consists of a series of nine financial exercises from the Kerin and Peterson casebook. These exercises provide you with the financial baseline required for grappling with the cases in this course. The cases are heavily laced with financial data that must be incorporated into your analyses and recommendations. **A major objective of this course is exercising your ability to translate your marketing decisions into their financial consequences**. Indeed, this is a critical skill that is continually exercised in this course.

Keeping Score Exercises (11 exercises worth 600 points)

Keeping Score exercises (11 exercises at between 20 and 80 points each for a total of **600** points). The Keeping Score exercises are designed to provide students with an understanding of basic metrics used in marketing decision-making. The recommended sequence for completing these exercises is contained in Table 1 below. However, the exercises are not technically due until the last official day of class. These exercises supplement the assigned financial exercises (discussed above) but are stand-alone and self-explanatory.

SONA Research Participation (200 Points)

Marketing research is a field of study in which a company collects and analyzes data to better understand customers and manage the company. Well-conceived and executed marketing research can help predict consumer trends, project sales, spot opportunities, and avoid potential problems.

As part of your Canvasing experience in this course, you must participate in research studies conducted by faculty members of the Department of Marketing and Logistics. Your participation in this research will make up roughly 8.4 percent of your final grade.

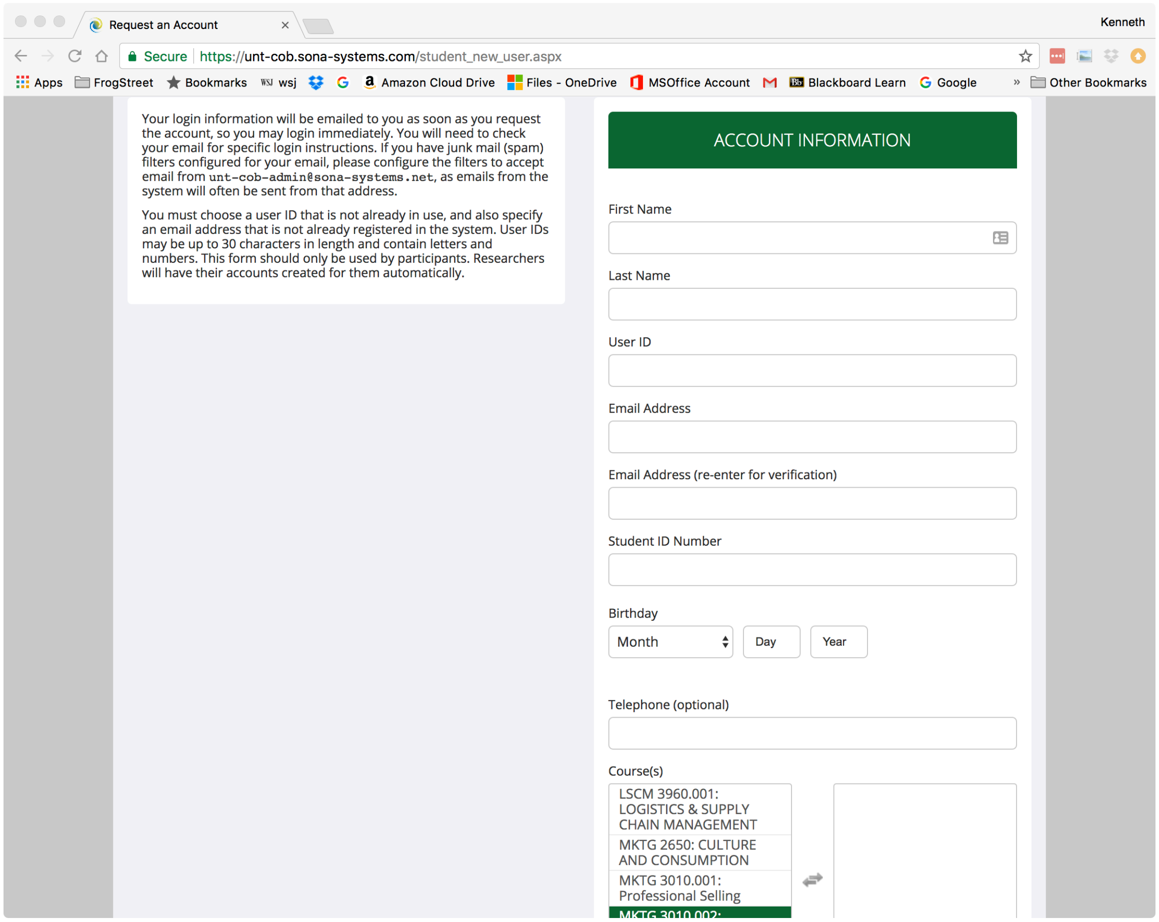
To participate in research studies, you must create an account on the CoB SONA page—a web application that allows you to browse available studies and schedule a time to complete studies either online or in the CoB Behavioral Lab (BLB 279). Credit is assigned based on the duration of the study and whether you participate online or in the CoB behavioral Lab:

- Short online studies (5-15 minutes) earn 1 credit
- Long online studies (20-30 minutes) earn 2 credits
- On-campus, lab studies (30-60 minutes) earn 4 credits (Not available this Summer due to COVID-19 restrictions)

To fulfill the 200-point course requirement, you must earn 5 SONA credits throughout the semester (i.e., 1 credit = 40 points toward your final grade). All credits earned will be added to your final course grade at the end of the semester. To sign up, please visit unit-cob.sona-systems.com and email COB.REP@unt.edu with any questions you may have.

How to sign up for SONA:

Step 1: Go to https://unt-cob.sona-systems.com and click “Request account.”
Step 2: Enter the account information (User ID = your UNT email). (See the form below)
Step 3: Click “Request account” and agree to the Human Subject policies.
Step 4: Update your profile—select the course(s) you are currently enrolled in (MKTG5150).
Step 5: Login and click “View available studies.”
Step 6: Click on a study, sign up, and participate!



Your Final Grade

Your final grade in the class is based on two criteria: 1) your participation in all assignments in each grade category; and 2) your total points earned in the course. **To receive any grade higher than a C in this class, you must:**

- Complete a minimum of **17** quizzes from the Kotler and Keller chapters;
- Complete (on time) all **four** assigned individual case summaries;
- Complete the financial exercises;
- Complete all Keeping Score exercises.

Failure to meet these minimums will result in a grade no higher than a C, regardless of how many points you have earned in the class.

Assuming that you have met the minimum participation requirements outlined in the last paragraph, your final letter grade will be based on the number of points you earned of the **2,390** possible in the class as follows:

% Grade	Letter Grade
90-100	A
80-89	B
70-79	C
60-69	D
Below 60	F

Final grades are just that, FINAL. The end of the semester is not the time to talk to me about grades. If you are not doing well it is your responsibility to contact me and try to determine how you can improve.

How I Communicate with Students

I make extensive use of the 'announcements' tool in Canvas to disseminate critical information in the class. You should check for announcements daily. The syllabus is always subject to change and such changes are announced via Canvas. I may (or may not) post a revised syllabus based on the announced changes.

I also like to 'listen in' on the case development discussion groups. I try to stay on top of your discussion sessions as you analyze each case and will often provide feedback on what I have read.

I will also schedule ZOOM meetings for students interested in synchronous discussions to assist with case development. These will tentatively be scheduled Thursdays and Saturdays at times yet to be determined.

Communicating with Instructors

All communications with instructors should be via Canvas e-mail. Do not use Eagle Mail or any other e-mail facility.

Treat all e-mail communications as professional correspondence. Remember that you are not e-mailing or texting a peer.

Please adhere to the following e-mail guidelines:

- Employ a subject line that indicates the content of your e-mail. 'RE:' should not appear in the subject line unless you are responding to a previous e-mail received from me.
- The body of your e-mail should begin with an appropriate salutation. It is best to simply use the salutation "Instructors" or "Professors" when emailing via Canvas since all instructors will receive your communications. If addressing a single instructor directly, use a more appropriate salutation. For example, you may address the primary instructor as "Dr. Thompson" or "Professor Thompson." This may sound pretentious, but titles do matter. Many professionals get offended when they are addressed in a less than formal manner. Do not begin your salutation with 'hi' 'hello' or 'hey.' You would be surprised

at the number of ‘hey dude’ salutations I receive from undergraduate students each semester.

- Pay close attention to spelling, punctuation, and grammar. Do not employ e-mail or ‘texting’ abbreviations, or slang. I strongly recommend that you compose your e-mail in a word processor and then paste the communication into your e-mail. Most word-processing programs have good spelling and grammar-checking capabilities. I certainly do not expect all writing to be error-free. I certainly make my share of errors. However, you should do your best.
- The ‘tone’ of your e-mail should be professional. Carefully proof your e-mail before hitting the ‘send’ button. Ask yourself how you would interpret the tone and content of the e-mail had you received it from someone else.

Failure to follow these guidelines may result in your unread e-mail being returned with a note to “edit and resubmit.”

Addendum on General University and Departmental Policies

Academic Misconduct

All work performed in this class must be your own. Violation of this policy can result in a grade of "F" for the course and notification of appropriate university officials for disciplinary action. Academic misconduct consists of but is not limited to, the use of notes or other memory aids during exams, obtaining/passing answers or other information from/to others during exams, plagiarism, passing copies of exams to others, and obtaining copies of exams from others. You should familiarize yourself with the University’s disciplinary rules and regulations available in the Student Guidebook and the Student Code of Conduct brochure. Both are available from the information desk in the Administration building or the third floor of the Student Union.

Departmental Policy on Grade Appeals

Any student who believes a grade has been inequitably awarded should first contact the instructor who awarded the grade to discuss the issue and attempt to resolve the differences. Any instructor no longer associated with UNT at the time of the appeal will be represented in these proceedings by the chair of the department in question. A student not in residence the semester following the awarding of the grade or a resident student who is unable to resolve the differences with the instructor has 30 days following the first day of the succeeding semester to file a written appeal with the chair of the instructor’s department, or the equivalent administrative unit. Refer to the Undergraduate Catalogue for further details.

Departmental Policy on Grade Changes

No grade except 'I ' may be removed from a student’s record once properly recorded. Changes are prohibited after grades have been filed except to correct documented clerical errors.

Requests for error corrections must be initiated immediately after the close of the semester for which the grade was recorded.

A faculty member who believes an error has been made in calculating or recording a grade may submit in person a request with a detailed justification for a grade change to the department chair and the appropriate dean. The Registrar accepts requests for grade changes only from the academic deans.

University Policy on Awarding and Removal of Incomplete (I)

The grade of I is a non-punitive grade given only during the last one-fourth of a semester. This grade can be awarded only if a student:

- Is passing the course;
- Has reasons beyond the control of the student why the work cannot be completed on schedule; and,
- Arranges with the instructor to finish the course at a later date by completing specific requirements that the instructor must list on the grade sheet.

A student may remove a grade of I within one year by completing the stipulated work, paying a fee at the Bursar's Office, and returning the permit form to the instructor. Obtain the Student Request to Remove Grade of I from the departmental secretary. The instructor then files the permit form in the Registrar's Office along with the grade, and the grade point average is adjusted accordingly. If a student does not complete the stipulated work within the time specified (not to exceed one year after taking the course), the instructor may change the grade of I to a grade that carries credit or assign a grade of F if appropriate. The GPA is adjusted accordingly.

A student who could not complete final examinations because of illness may remove a grade of I without payment of the fee. The academic dean is authorized to waive the fee upon certification of illness signed by the attending physician.

Departmental Policy for Informing Students of Final Grades

Final grades will be posted through the grade book within Canvas. Please keep in mind that departmental staff are not allowed to give out grades. Do not call or stop by the department office to ask for your grade. Dr. Strutton or other authorized individuals are the only people who can release grades.

Americans with Disabilities Act

The University of North Texas makes reasonable academic accommodations for students with disabilities. Students seeking reasonable accommodation must first register with the Office of

Disability Accommodation (ODA) to verify their eligibility. If a disability is verified, the ODA will provide you with a reasonable accommodation letter to be delivered to the faculty to begin a private discussion regarding your specific needs in a course. You may request reasonable accommodations at any time, however, ODA notices of reasonable accommodation should be provided as early as possible in the semester to avoid any delay in implementation. Note that students must obtain a new letter of reasonable accommodation for every semester and must meet with each faculty member before implementation in each class. Students are strongly encouraged to deliver letters of reasonable accommodation during faculty office hours or by appointment. Faculty members have the authority to ask students to discuss such letters during their designated office hours to protect the privacy of the student. For additional information, refer to the Office of Disability Accommodation .website at http://www.unt.edu/oda. You may also contact ODA by phone at (940) 565-4323

My office hours and office number are shown on the first page of this syllabus. Please note: University policy requires that students notify their instructor within the first week of class that an accommodation will be needed. Please do not hesitate to contact me now or in the future if you have a question or if I can be of assistance.

UNT College of Business Student Ethics Statement

The following is the UNT College of Business ethics statement which all students in this class are required to read and acknowledge.

> *"As a student of the UNT College of Business, I will abide by all applicable policies of the University of North Texas, including the Student Standards of Academic Integrity, the Code of Student Conduct and Discipline, and the Computer Use Policy. I understand that I am responsible for reviewing the policies as provided by the link below before participating in this course. I understand that I may be sanctioned for violations of any of these policies by procedures as defined in each policy*
>
> *I will not engage in any acts of academic dishonesty as defined in the Student Standards of Academic Integrity, including but not limited to using another's thoughts or words without proper attribution (plagiarism) or using works in violation of copyright laws. I agree that all assignments I submit to the instructor and all tests I take shall be performed solely by me, except where my instructor requires participation in a group project in which case I will abide by the specific directives of the instructor regarding group participation.*
>
> *While engaged in online coursework, I will respect the privacy of other students taking online courses and the integrity of the computer systems and other users' data. I will comply with the copyright protection of licensed computer software. I will not intentionally obstruct, disrupt, or interfere with the teaching and Canvasing that occurs on the website dedicated to this course through computer "hacking" or in any other manner.*

I will not use the university information technology system in any manner that violates the UNT nondiscrimination and anti-sexual harassment policies. Further, I will not use the university information technology system to engage in verbal abuse, make threats, intimidate, harass, coerce, stalk, or in any other manner which threatens or endangers the health, safety, or welfare of any person. Speech protected by the First Amendment of the U.S. Constitution is not a violation of this provision, though fighting words and statements that reasonably threaten or endanger the health and safety of any person are not protected speech."

Changes to the Syllabus

I reserve the right to make changes to this syllabus at any time. Such changes may be verbal in nature or disseminated via announcements in BB. There may not be a hard copy revision to this document. It is your responsibility to stay on top of any changes that have been made, regardless of how the change is disseminated.

Table 1
Schedule of Readings, Cases, Exams, and Deadlines

Week	Reading Assignment	Cases	Assignments/Deadlines
Week 1 Aug 21-27	Chapter Readings: • CT[1]: Financial Aspects of Marketing Management • KK 1[2]: Defining Marketing for the New Realities	**Americana Hotels Case (introductory ungraded case)** A sample' individual case report' is available in the Americana folder.	Read the Americana case and its associated' guide to case analysis.' Most importantly, make sure you understand the structure of the sample' individual case report' for Americana. This is a good template for what is expected from your reports. Complete KP Financial Aspects of Marketing Management Problems 1 – 9. Submit your completed solutions to me via the assignment tool. These are graded problems and are due by 11:59 pm Sunday, Aug 27 Solutions will be posted to Canvas.
Week 2 Aug 28-Sep 3	Chapter Readings: • KK 2: Developing and Implementing Marketing Strategies and Plans • KK 3: Capturing Marketing Insights & Forecasting Demand • KK 4: Creating Long-term Loyalty Relationships • KK 5: Analyzing Consumer & Business Markets	**Develop Zoëcon Corp: Insect Growth Regulator Case**	• KK Quizzes 1, 2, 3, 4, 5 Close at 11:59 pm on Sunday, Sep 3 • KS1 Understanding Market Share • KS2 Demand Projection Exercise
Week 3 Sep 4-10	Chapter Readings: • CT: Product & Service Strategy and Brand Management • KK 6: Identifying Market Segments & Targets • KK 7: Crafting the Brand Positioning & Competing Effectively • KK 8: Creating Brand Equity & Driving Growth	**Continue Developing & Submit Zoëcon Corp: Insect Growth Regulator Case**	• Zoëcon Individual Case Reports due Sunday, Sep 10 at 11:59 pm • KK Quizzes 6, 7, 8 Close at 11:59 pm on Sunday, Sep 10 • KS5 Understanding Costs and Margins • KS6 Break-Even Analysis
Week 4 Sep 11-17		**Develop the South Delaware Coors (SDC) Case**	• Online discussion of Zoëcon case all week (Monday 8:00 am through Sunday 11:59 pm). • KK Quizzes 9, 10 Close at 11:59 Sunday, Sep 17. • KS7 Markup Pricing

[1] CT means 'Custom Text.' Used to identify chapters from the Kerin and Peterson texts included in the Custom Text.

[2] KK means 'Kotler and Keller.' Used to identify chapters from the Kotler and Keller text.

Week	Reading Assignment	Cases	Assignments/Deadlines
Week 5 **Sep 18 - 24**	**Chapter Readings:** • **CT: Opportunity Analysis, Market Segmentation, Target Marketing** • **KK 9: Setting Product Strategy and Introducing New Offerings** • **KK 10: Designing and Managing Services**	**Continue Developing & Submit the South Delaware Coors (SDC) Case**	• **SDC Individual Case Reports due Sunday, Sep 24 at 11:59 pm.** • **KK Quizzes 14, 15, 16, and 17 Closes at 11:59 pm on Sunday, Sep 24.** • **KS11 Return on Sales & Return on Investment** .
Week 6 **Sep 25 - Oct 1**	**Chapter Readings:** • **CT: Integrated Marketing Communications** • **KK 14: Designing & Managing Integrated Marketing Communications** • **KK 15: Managing Mass Communications** • **KK 16: Managing Digital Communications** • **KK17: Managing Personal Communications 23 -**	**Develop the Breeder's Own Pet Food (BOPF) Case**	• **KK Quizzes 12, 13 Close at 11:59 pm on Sunday, Oct 01** • **KS 3 Customer Lifetime Value** • **KS4 Cannibalization of Sales**
Week 7 **Oct 2 - 8**	**Chapter Readings:** • **CT: Marketing Channel Strategy & Management** • **KK 12: Designing and Managing Integrated Marketing Channels** • **KK 13: Managing Retailing, Wholesaling, & Logistics**	**Continue Developing & Submit the Breeder's Own Pet Food (BOPF) Case**	• **BOPF Case Reports due Sunday, Oct 8 at 11:59 pm.** • **KK Quizzes 11, 18 Close at 11:59 pm on Sunday, Oct 8.** • **KS9 Number of Sales Reps** • **KS8 Reps Vs. Agents** • SONA credits must be completed by Sunday, Oct 8
Week 8 **Oct 9 - 13**	**Chapter Readings:** • **CT: Pricing Strategy & Management** • **KK11: Developing Pricing Strategies and Programs** • **KK 18: Managing Marketing in the Global Economy**	**Develop & Submit the Crafton Industries (CI) Case**	• **CI Case Reports are due Friday, Oct 13 at 11:59 pm** • **KS 10 Weighted Point Decision Models**

Appendix
Content and Format of the Case Reports

You must generate a written report for each assigned case. These "Case Reports" should not exceed six (6) pages in length (exclusive of tables and figures), must be typed using **single-spacing,** and employ **10- or 12-point fonts**. All written submissions should be in **MS Word** format.

Your written reports must follow the format outlined below. The sample case report for the **Americana Hotels case** (Folder 2) is an excellent template for exactly what is expected on your case reports. Similar report templates are provided for every case. These templates are designed to structure your case report submissions. Each case report template will be reviewed when its associated case is introduced. Referring to the sample case report (I suggest that you print it for review as you read the following information), note that the report is divided into three major sections:

> **Cover Sheet** (First Page). The cover sheet should contain the information shown in the sample. Note that this page is centered top to bottom, as well as left to right. This page should not be numbered.
>
> **Body of Report** (Pages 1 through 6**).** The body of your report consists of two sections: (1) Definition of the Problem and (2) Recommendation(s). The structure and content of these sections are discussed in more detail below.
>
> **Tables and Figures** (Remaining pages). The remaining pages in your report hold any tables and/or figures that support your discussion. The required structure and content of tables and figures are also examined in detail below.

As indicated above, the body of your case report consists of two sections, each of which should begin with the specific headers identified in bold print below:

> **Definition of the Problem.**
>
> Define the problem(s) in the case. You should be able to do this with no more than one or two sentences. The problem definition is generally provided for you in the guide to the analysis of each case.
>
> **Recommendation(s).**
>
> This section comprises the bulk of your paper and must be supported with tables and figures. As part of your case analysis, you should have thoroughly examined all major alternatives. However, in most cases, the only alternative you present in your paper is your recommended alternative. Summarize your recommendation in the first paragraph of this section.
>
> Next, in this section, you should examine each major **decision factor (DF)** under its heading, and in detail. **Decision factors** (DFs) are the major factors in the case that have pointed to your recommendations. Think of DFs as the pros and cons associated with your recommendation. Note the headers for the DFs in the sample Americana Hotels case report: Profitability, Market & Competitive Environments, Physical Characteristics of the Property, Jamaican Political Stability and Future Tourism, and Managerial Experience with Property Types. These headers are akin to headlines used in newspapers. They indicate to the reader the nature of the discussion that follows. **All cases have associated report templates and grading rubrics attached to the assignment page in Canvas. These templates and rubrics provide detailed descriptions of how DFs should be formatted**.
>
> You should examine the presentation on **"The Role of DFs for Conducting Case Analyses."** The .pdf file is contained in the folder titled '**Instructor's Guides to Your Analysis of the Kerin & Peterson Cases.'** This handout is, in part, the subject of the graded quiz over the syllabus and the sample Americana case.

Structuring Your Tables and Figures

Tables and figures are used to support your recommendation(s). Tables and figures generally are the best ways to summarize key points of data. "**Tables**" are employed to summarize numerical data, while "**Figures**" are used to identify graphics. The proper use of tables and figures is a major component of your grade on each case (see the attached sample grading form).

Specific considerations for developing and employing tables and figures are:

- **All tables and figures are placed at the end of your report**, each on its separate page.
- **Any tables and figures that you include in your paper should not be a 'cut and paste' job** from those included in the case or my case guides. All tables and figures that appear in your report should be based on your interpretation of the information contained in the case. Do not copy tables and figures from the cases (or the guides to case analysis) into your reports (referred to as 'exhibits' in the cases).
- **All tables and figures should be numbered and titled**. Titles should immediately follow the table or figure number, as shown in the sample. All tables and figures should be numbered in the order in which they are discussed. Center the title above all tables and figures. Do not title your tables as 'exhibits.' This terminology is reserved for referencing tables and figures from the cases (to avoid confusion).
- **Tables and figures must be referenced and examined/explained (in detail) in your discussion**. Your discussion must tell me exactly what to look for in each specific table or figure that you include. For example, you may want to discuss a break-even analysis that is contained in a table in your report. You could say (note that the ellipses employed suggest that additional justification verbiage should be present):

  "The break-even analysis is presented in Table 1. Note that the break-even points in unit sales, dollar sales, and market share are …. Break-even computations are based on fixed cost estimates of ….. and an assumed price per unit of… This price is justified based on…."

  Elements of your discussion may duplicate information contained in your table/figure footnotes.
- **Initially develop your tables (and figures) in Excel** to ensure that your computations are correct. Then, re-build your tables in Word. Word's tabling functions are excellent. Please do not embed your Excel spreadsheets into Word. I cannot provide editing comments on specific entries on embedded Excel spreadsheets. As an alternative to re-building your tables in Word, you can copy your tables from Excel into Word by using the "Paste Special" function and then selecting the "Formatted Text (RTF)" option. This procedure essentially converts the table from an Excel format to a Word format. Finally, **do not send your Excel spreadsheets** – I won't bother looking at them. Your Word document should contain everything relevant to your case report.
- **Key data in all tables and figures should be footnoted.** These footnotes should contain specifics on how table entries were computed, the source(s) of the information provided, and any other explanatory points. Use superscripted numbers for your footnotes. The footnote numbers within the table body should occur to the right of the label for your footnoted entry. This number should correspond exactly to the number of the explanation that appears directly below the table body. All footnoted explanations are directly below the table body, not at the bottom of the page. Footnotes are a critical component of your tables (and figures). Their proper use is also an essential component of your grade. I expect to see them.

  Note again that the footnote explanations are directly below the table body, not at the bottom of the page. Footnote numbers should start with '1' for each table. You cannot use the automated footnote function in Word since it places footnotes at the bottom of the page and numbers footnotes continuously. Do not employ letters or symbols (such as "") for identifying footnotes.* ***Footnotes should not just be strings of numbers. Add explanatory information as appropriate.***

- Tables should not be strings of computations e.g. showing how you computed break-even. This is a bad practice. The best approach is to table the results of your computations and employ footnotes to the table for your calculations and explanations of these calculations.[3]

- **Discuss the key data points in your tables/figures. A mistake many students make involves a failure to discuss what is on your tables.** You don't need to provide the excruciating details of your computations (the footnotes to your tables should contain these details). However, you should highlight key data points and discuss what these mean, along with any critical assumptions, limitations, etc. Use some judgment here. Again, remember that tables and figures do not "stand alone." You must refer to the table/figure by number and summarize the critical information. Discuss the table. Tell the reader what to focus on. Don't make the reader 'dig' for the meaning inherent in the numbers summarized in your tables.
- **Your tables/figures should be professional.** Poorly constructed exhibits detract from your argument. How you present your information is just as important as what the information says. A question you should always ask is "Would I be willing to share these exhibits with my boss in a business meeting?" This admonition applies to your case as a whole. Pay close attention to your writing style. Keep it professional.

Additional Requirements and Suggestions

Your paper should be submitted to me via the Canvas Assignments Tool as an attachment in MS Word format. An 'assignment' has been created for each case. These assignments will direct you to submit your reports as attachments to the respective assignment page. Each assignment page also contains a sample of the grading form (rubric) employed for your reports. Submissions must be submitted on or before the deadline for the case (See Table 1 for all major deadlines for the course). All submissions should be in Microsoft Word format. Do not submit any Excel spreadsheets. The tables and figures within your reports should encapsulate any relevant data from any spreadsheets you employed for your analysis.

Pay attention to writing style, grammar, spelling, capitalization, punctuation, etc. A portion of your grade is based on how well you communicate your analysis. It is strongly recommended that you thoroughly proof your drafts before submission. It is always a good idea to supplement the proofing process with the spelling and grammar-checking facilities built into Word. A common error made by students is to use personal pronouns in professional writing. Please avoid using "I," "you," "me," "my," etc. in your writing. Dr. Thompson's use of personal pronouns in course materials should not be emulated. He employs this particular writing style for pedagogical reasons only.

Guides have been created for the analysis of each case. These "case guides" are contained in the **"Instructor's Guides to Your Analysis of the Kerin & Peterson Cases"** folder. The questions posed in these guides are intended as aids to your analysis of each case. Note, however, that the questions in the guides are not to be used as the basis for formatting or organizing your case reports. Students often mistakenly assume that their case reports need only provide answers to the questions posed in the case guides. This is a big 'no-no.' Do not treat the questions as DFs. However, the questions do suggest the major DFs that are likely to exist.

Be sure and read the Kerin and Peterson "Strategic Marketing Problems" chapters that precede each group of cases. For example, the chapter preceding the first series of cases is titled "*Opportunity Analysis, Market Segmentation, and Market Targeting*." This chapter provides direction for the cases that follow. The failure of students to do well on their case reports often stems from their failure to read these KP chapters before

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[3] Note that Dr. Strutton often violates this policy for tables and figures in the case guides and postmortems. This is done for pedagogical purposes only.

attempting the case. Indeed, the guides to the analysis of each case assume that you have already digested the KP material.

You must adequately address the financial data contained in each case to earn a grade higher than a 'C' (70%) on any case. The 'solutions' to the cases depend heavily on crunching the numbers provided in the case. You will find Kerin and Peterson's chapter two on "*Financial Aspects of Marketing Management*" extremely valuable in this regard. Indeed, your first assignment in the course is to read this chapter and work through the problems at the end of the chapter. This is a graded assignment and solutions will be posted to Canvas. You should take these problems seriously and strive to understand them.

You are not to use materials obtained from the Internet about any cases employed in this course. In previous classes, I have noted that some students have used language in their case reports that compare closely with the language employed in some of the canned case solutions that are available on the Internet. These case solutions generally are either wrong or are approached and written differently from what is expected in this course. It is strongly suggested that you avoid the temptation to use information pulled from the Internet. Moreover, all case reports are automatically run through the Turn-It-In program to spot-check instances of this behavior.

Important Note!!! It is perfectly acceptable for you to collaborate on your case analyses with other students via the 'brainstorming discussion groups mentioned earlier. However, your '*individual case reports'* for these cases must be written by you alone. You cannot 'cut and paste' from what other discussants have written. In addition, any tables or figures you employ must be your productions. You can employ common data developed within the discussion forum, but how you summarize the data for your reports must be your creation.

A note on how I approach grading cases is in order at this point. A grading form (rubric) is employed. The rubrics are different for each case. Each case grading rubric can be previewed via the assignment tool. **Make sure you review these for each case**. As noted earlier, students who fail to adequately make use of the key financial data from the case should expect no more than a "C" grade. Indeed, grades will be downgraded in the event of any deficiencies that affect the quality of the recommendation. This includes failure to communicate your recommendation and supporting justification or failure to follow writing style requirements.