
 FLORIDA ATLANTIC UNIVERSITY	COURSE CHANGE REQUEST Undergraduate Programs		UUPC Approval <u>4/29/24</u> UFS Approval _____ SCNS Submittal _____ Confirmed _____ Banner Posted _____ Catalog _____
	Department Marketing College Business		
Current Course Prefix and Number MAR4803		Current Course Title Marketing Strategy	
<i>Syllabus must be attached for ANY changes to current course details. See <u>Template</u>. Please consult and list departments that may be affected by the changes; attach documentation.</i>			
Change title to: Change prefix From: _____ To: _____ Change course number From: _____ To: _____ Change credits* From: _____ To: _____ Change grading From: _____ To: _____ Change WAC/Gordon Rule status** Add <input type="checkbox"/> Remove <input type="checkbox"/> Change General Education Requirements*** Add <input type="checkbox"/> Remove <input type="checkbox"/> <small>*See <u>Definition of a Credit Hour</u>.</small> <small>**WAC/Gordon Rule criteria must be indicated in syllabus and approval attached to this form. See <u>WAC Guidelines</u>.</small> <small>***GE criteria must be indicated in syllabus and approval attached to this form. See <u>Intellectual Foundations Guidelines</u>.</small>		Change description to: This is the capstone course for Marketing majors. Students will learn techniques to analyze operational and strategic planning problems confronting marketing managers and help them employ competitive strategies in a global environment. Topics include environmental scanning, market segmentation and targeting, organizational resources, relationship marketing, and new product decisions with an emphasis on linking internal company factors to external industry factors. Change prerequisites/minimum grades to: Change corequisites to: Change registration controls to: Please list existing and new pre/corequisites, specify AND or OR and include minimum passing grade (default is D-).	
Effective Term/Year for Changes: Fall 2024		Terminate course? Effective Term/Year for Termination:	
Faculty Contact/Email/Phone Ann Root/aroot@fau.edu/561-297-4179			
Approved by Department Chair _____ <i>Kenny</i> College Curriculum Chair _____ <i>Neigo</i> College Dean _____ <i>Paul</i> UUPC Chair _____ <i>Korey Sorge</i> Undergraduate Studies Dean _____ <i>Dan Meeroff</i> UFS President _____ Provost _____		Date 4/9/2024 4-15-24 4/15/24 4/29/24 4/29/24	

Email this form and syllabus to mjenning@fau.edu seven business days before the UUPC meeting.



MAR4803-002
Marketing Strategy

CRN: 13096
WF 2:00-3:20

Building: Phil Smith Hall Boca Room: 308
3 credits

Spring, 2024

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Course Description

This is the capstone course for Marketing majors. Students will learn techniques to analyze operational and strategic planning problems confronting marketing managers and help them employ competitive strategies in a global environment. Topics include environmental scanning, market segmentation and targeting, organizational resources, relationship marketing, and new product decisions with an emphasis on linking internal company factors to external industry factors.

Instructional Method

This class is in-person and there is no remote option. Corresponding PowerPoint slides will be uploaded. Case report/Final project instructions will be provided and students are required to submit assignments/project following instructions and according to the deadlines. Also, both the midterm and final exams are conducted in-person on pre-specified dates and times. Finally, several methods of communications are offered so that students can contact instructor during or outside office hours.

Prerequisites/Corequisites

Senior standing and MAR 3023 (3 hours), FIN 3403 (3 hours), QMB 3600 (3 hours), MAN 3025 (3 hours)

Course Objectives/Student Learning Outcomes

- Understanding of key strategic marketing concepts and decision-making constructs.
- Application of marketing concepts to both fictional and real-world business situations.
- Ability to use marketing strategy tools and techniques.
- Ability to critically evaluate business problems and to determine the most appropriate analytical solutions.

- Ability to develop a marketing plan in support of a new product. provide the students an understanding of what they will be expected to learn as a result of successfully completing the course.

Course Evaluation Method

Final evaluation of this course would be based on the following:

Case Reports (180 points):

- A case study is a collection of facts and data based on a real business situation.
- The goal of a case study is to enhance your ability to understand and solve business problems, using logical frameworks and marketing strategy tools.
- In this course, we analyze 12 case studies.
- **Each case study assignment has its own instructions.**
- For each case you should write down a case report, **either individually or in a group** (Individual vs. Group case reports are specified in the course outline).
- You use the same groups for marketing plan project.
- Each case report is worth of 20 points.
- For group reports, the group representative submits one report on behalf of all members.
- Each case is about a COMPANY and an INDUSTRY.
- Each report must cover **4** parts:
 - a. PART 1: In **1-2 paragraphs**: A summary of facts, issues, and questions **mentioned in the case**. During your reading of the case, you should identify crucial facts, figures and charts, and identify critical comments made by individuals. The facts stated in a case often point to the key issue(s) facing a firm, such as new opportunities, a changing environment, a decline in competitive position, or excess inventories.
 - b. PART 2: In **1 page**: Presentation and interpretation of relevant and critical information of **the company** and **the industry**. **This is information not mentioned in the case and you should collect from outside resources. Information covers any text, chart, figure, table, ... from any outside resources including journals, magazines, blogs, books, papers, ads, web resources, ...**. Make a connection between this information and facts/issues from the case to judge the rationality of past and current decisions. While facts should be accepted as true, statements, judgments, and decisions made by the individuals in a case should be questioned, especially if not supported by facts—or when one individual disagrees with another. This section contains your thoughtful evaluation of industry, market, buyer behavior and organization. **Be careful not to restate case information**, rather focus on

assessment and interpretation of the facts, qualitative and quantitative data and management views.

- c. PART 3: In **1 page**: you will use a marketing strategy tool or technique that is **SPECIFIED FOR THIS CASE IN THE INSTRUCTIONS**. This section differs in each assignment and you should pay attention to instructions.
 - d. PART 4: Without limitation, **and using anything you gathered in the last three parts**, you should answer questions that come at the end of the case.
- **Remember: Information or data not included in the case that you found through independent research is very important to me and may have bonus points too. Such information must be referenced. References should be business journals, periodicals, and websites. Wikipedia and blogs are not acceptable. References should be cited throughout your paper where applicable.**
 - The due date for each case report is specified in the course outline. Since, we discuss the case in the class on the due date, **no late report is accepted**. All reports are due on Sundays and they should be submitted to me **via CANVAS before Wednesday 1:30 pm**.
 - Format (**50% will be deducted** from unformatted reports):
 - A word document.
 - Include a cover page listing case title and student name.
 - Answers should be typed in 12 pt., 1.5 lines spacing, and 1-inch margins.
 - The report should be 2-3 pages, plus appendices including the necessary tables/figures showing the outputs of the analyses. All tables and figures should have a clear and nice graphical representation.
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Case Discussions (120 points):

- This includes active participation in all case discussion sessions on specified dates.
- All students are expected to be prepared and participate in discussions actively.
- Attendance IS NOT counted towards participation.
- This a major part of this course you should know from now and NO EXECUSES for not participating will be accepted in the future.
- This participation may involve bringing up facts and information in the case, bringing up relevant information from other resources, mentioning valuable points, raising questions, answering questions in the case, answering questions raised by other students, commenting on other students opinion, proposing an action or strategy, criticizing an action or strategy, commenting on the marketing strategy technique, any debate, argument, fight, ...
- This discussion happens through 'Discussion Rooms in Canvas.'
- There is no live discussion. You will only type your comments

- I will create specific rooms for each case discussion beforehand and outline topics and questions in my mind. There is no limitation for your comments.
- **Do not copy/paste answers from your case reports. But you can elaborate on any fact or figure you have collected for your report. You can express the same content in another way but DO NOT COPY/PASTE.**
- Since all students may not have an opportunity to participate in discussions (due to class constraints), you are expected to participate in at least 75% of case discussions (9 out of 12). If you miss a case discussion session, there is no way to make it up. So carefully consider the 9 out of 12 requirement.
- On the midterm, I will let you know about your performance on in-class discussions. Hence, you will have an opportunity to make more efforts if needed.
- Discussions grading would be based on my evaluation of the **quality** and quantity of your participation after each session such that:
 - No participation: 0 points
 - Lower than expectation: 8-11 points
 - Meeting expectations: 12 points
 - Higher than expectations: 13-16 points

Your discussion grade in each session will be counted towards 120 points. These are some examples of how you can earn full 120 points (you cannot exceed 120 points):

Sessions												
1	2	3	4	5	6	7	8	9	10	11	12	Total
0	12	12	12	12	12	12	12	0	12	12	12	120
16	16	16	16	16	16	16	8	0	0	0	0	120
12	0	16	6	13	10	15	12	13	0	14	9	120
0	0	0	0	16	16	16	16	16	16	12	12	120
12	0	0	12	0	14	15	13	12	12	16	14	120

- Hence, you may earn full 120 points fairly quickly. Then you don't need to participate in any other discussions (you can but no extra points).
- Even if you lose points in a session you have the opportunity to make it up in future sessions. So always screen your discussion points before it's too late!
- I emphasize that the quality of your comments is more important than the quantity of them.

Midterm Exam (150 points):

- Your exam will be taken during the class time on Wednesday February 28th.
- The exam covers material discussed from 1/10 to 2/21 plus corresponding book chapters.
- Case study assignments will not be questioned in the exam.
- It's an individual, closed-book, closed-note, closed-laptop exam.

Final Exam (250 points):

- Your final exam will be on Wednesday May 1st.
- The exam covers material discussed from 3/1 to 4/21 corresponding book chapters.
- Case study assignments will not be questioned in the exam.
- It's an individual, closed-book, closed-note, closed-laptop exam.
- Questions will be either in multiple choice or mini case, open-ended format or a combination.

Marketing Plan Final Report (300 points):

If you have an idea for a business, this is a good time to explore the idea. It's better to have an unsuccessful marketing plan before you might invest in it. Unlike a business plan, which offers a wide overview of the company and its operations, employees, resources, financials, marketing, and its overall vision and mission, a marketing plan is about detailed actions. It serves to document how a company may serve customers through specific marketing strategies and tactics.

To develop a successful marketing plan you need a great deal of data/information about the company and its industry. Only then you can implement data analytics tools to generate knowledge based on critical marketing theories and concepts. That way you create insights to improve managers' decision making. Besides that, for the successful implementation of a marketing plan, you need to identify progress measures, resource limits, timing/schedules, control, and monitoring systems. In this project assume that you are a consulting agency that is asked to develop a marketing plan for a client firm. That means you are responsible for the collection, and organization of data/information, applying what you have learned from data analysis tools in this course, and generating clear, feasible marketing actions.

Instructions: The plan should involve a new product from a real, big, well-known company. Please do not submit a marketing plan of an existing product. Your project consists of 11 phases, all of them should be included in your final report with all the details specified. You do not need to report each phase during the semester. But it is wise to work on your project step by step and talk to me whenever you have any concern about each phase. Feel free to contact me via email or in person any time you want to discuss your project from initial phases, e.g. choosing the company, to last stages of writing the report. In this project, you will also implement all you have learned about using marketing strategy tools and techniques. Hence, this project will reflect your learnings from the course and will let you implement what you have learned.

Phase 0: Create the Team

- Teams must consist of 4-5 students. Same group will be used for submitting group case reports. Be wise in choosing your team members. Any concern about cooperation, duty assignments, free riding, time conflicts, etc. is **your responsibility at the first place.** However, I **may** interfere in some cases. Remember the whole group submits only one version of the report on behalf of all members.

Phase 1: Choose a big company

- Choose a big, known company for which there is enough information and data.
- In this stage, you should present any information, text, figure, table, statistics, etc. that is relevant to
 - Your company's finance, marketing, manufacturing, R&D, advertising,

operations, CRM, sales force, social media presence, or any other department.

- Company's products. The information may be organized by product line, by type of customer, by market, or by the order of product introduction.
- Information should be helpful in understanding key issues, opportunities, concerns, or constraints regarding the introduction of the product.
- For this section you should write down **at least 2 pages**.

Phase 2: Choose an industry and a product category in that industry.

- Obtain information about industry news and trends.
 - Competition (number of competitors, main competitors, market shares, etc.)
 - Industry's legal, social, economic, political, environmental, technological aspects
- Choose a product category based on reasoning. Product category must be neither too general nor too specific.
- Present important (technology) trends, new findings, business news, etc. related to your product category.
- Finally, introduce the new product and explain how and why it is different than other products. You should very briefly explain product features you expect and how those features address customers' needs and wants.
- For this section you should write down **at least 2 pages**.

It is your primary responsibility to assure that there are enough data and information resources for your chosen company and product category. No excuses about the lack of data or information is acceptable.

Phase 3-7: Use Market Strategy Tools and Techniques

Phase 3: Perceptual Mapping

Phase 4: 5 Forces

Phase 5: SPACE Analysis

Phase 6: SWOT Analysis

Phase 7: Resource Portfolio

All of the above stages will be discussed in the class thoroughly. A clear, nice, graphical representation of the outcomes of each analysis tool is crucial.

Phase 8: Segmentation, Targeting, Positioning

- You need to critically evaluate current segmentation, targeting and positioning of your client. You should clearly indicate whether you agree, for example, with customer groups that are currently being targeted by the business. Maybe the business does a great job in understanding its customers and position itself relative to its competitors. If so, defend the business segmentation, targeting and positioning. If not, suggest a better way that the business could segment its customers, target the right groups and position itself. Whatever suggestion you make must be accompanied by your logic/reason. Maybe one component needs refinement, maybe two or maybe all three. Make a case as why your STP makes sense.

- For this section you should write down **at least 2 pages**.

Phase 9: Propose product, pricing, distribution, and communication strategies

- Describe all product features related to its functionality, performance, brand, logo, packaging, appearance, luxury, etc.
- Describe the price you are going to charge in retail and **explain how you reached that price**. Describe your pricing strategy: penetrating, skimming, etc.
- Describe your channel strategy: How will you get your product from the producer to the consumer? Online, offline, or hybrid? Why? If you are using retail store, describe store location, design, atmosphere, staff, etc. If you are using an online website, describe website features such as design, interface, etc. If you are using both online and offline, how do you manage their consistency and overall efficiency?
- Describe your strategies for advertising, sales promotions, public relations, personal selling, and direct marketing? Describe how you use social media to connect with your customers and promote sales. Which platforms you will use? How? Why?
- For this section you should write down **at least 4 pages**.

Phase 10: Budget, Controls, and Schedule

- Talk about some budgetary, time, legal, political, or any other limitation or consideration the company may have in implementing your proposed strategies. Try to answer the following questions:
Are there enough financial resources for implementing the strategy? How is the government react? Any legal issues imposed by competitors? Is the political environment appropriate for the strategy? When the company should announce the new product? What about preannouncements?
- Also, you can talk about how the company can measure the success of the new product when the company should decide about increasing production volume, or maybe in the case of failure the company needs to remove the product from the market; how and how quickly?
- Overall, any problem that could happen and any measurement company should consider.
- For this section you should write down **at least 1 page**.

Phase 11: Write down the Marketing Plan Report

- You should provide an executive summary.
- Organize your report in the same fashion of 12 phases subsequently.
- I should be able to easily find any of the components of your report.
- Your final report should include
 - A title page which includes the course title, the section number, group member names, the name of the company, the name of the product, as well as the submission date.
 - A table of contents
 - 2-11 phases, titled.
 - References in APA format.

- The Word document report excluding title page, table of contents, and references **must be at least 15 pages** (typed, 12 font-Times New Roman, double-spaced). Everything should be presented in a pretty and professional manner. No typo, spelling errors, or wrong format.

Marketing Plan Project Rubric:

Phase	Points
Phase 1: Company Information	25
Phase 2: Industry Information	25
Phase 3: Perceptual Mapping	20
Phase 4: 5 Forces	20
Phase 5: SPACE	20
Phase 6: SWOT	20
Phase 7: Resource Portfolio	20
Phase 8: STP	30
Phase 9: Marketing Mix	60
Phase 10: Budget, Control, Schedule, and Limits	20
Phase 11: Writing and Format	40
Final Grade	300

Course Grading Scale

Case Analysis Reports	180	points
Case Discussions	120	points
Midterm Exam	150	points
Final Exam	250	points
Marketing Plan Final Report	300	points
Grand Total	1000	points

Letter Grade: A	Percentage: 93.00% – 100.0%	Total Points: 930 – 1000
A-	90.00% – 92.99%	900 – 929.9
B+	87.00% – 89.99%	870 – 899.9
B	83.00% – 86.99%	830 – 869.9
B-	80.00% – 82.99%	800 – 829.9
C+	77.00% – 79.99%	770 – 799.9
C	70.00% – 76.99%	700 – 769.9
D+	67.00% – 69.99%	670 – 699.9
D	63.00% – 66.99%	630 – 669.9
D-	60.00% – 62.99%	600 – 629.9
F	below 60.00%	below 600

Policy on Makeup Tests, Late Work, and Incompletes

Missing Exams:

If you think you may miss an exam, you should let me know at least 72 hours before the exam via email. Only in that case, you may have a make-up exam. A physician's note for a medical condition, or a document of engagement in a University approved activity or a religious holiday may be required.

Case Reports:

Late case reports will not be accepted.

Policy on the Recording of Lectures

Students enrolled in this course may record video or audio of class lectures for their own personal educational use. A class lecture is defined as a formal or methodical oral presentation as part of a university course intended to present information or teach students about a particular subject. Recording class activities other than class lectures, including but not limited to student presentations (whether individually or as part of a group), class discussion (except when incidental to and incorporated within a class lecture), labs, clinical presentations such as patient history, academic exercises involving student participation, test or examination administrations, field trips, and private conversations between students in the class or between a student and the lecturer, is prohibited. Recordings may not be used as a substitute for class participation or class attendance and may not be published or shared without the written consent of the faculty member. Failure to adhere to these requirements may constitute a violation of the University's Student Code of Conduct and/or the Code of Academic Integrity.

Attendance Policy

Students are expected to attend all of their scheduled University classes and to satisfy all academic objectives as outlined by the instructor. The effect of absences upon grades is determined by the instructor, and the University reserves the right to deal at any time with individual cases of non-attendance. Students are responsible for arranging to make up work missed because of legitimate class absence, such as illness, family emergencies, military obligation, court-imposed legal obligations or participation in University-approved activities. Examples of University-approved reasons for absences include participating on an athletic or scholastic team, musical and theatrical performances and debate activities. It is the student's responsibility to give the instructor notice prior to any anticipated absences and within a reasonable amount of time after an unanticipated absence, ordinarily by the next scheduled class meeting. Instructors must allow each student who is absent for a University-approved reason the opportunity to make up work missed without any reduction in the student's final course grade as a direct result of such absence.

Counseling and Psychological Services (CAPS) Center

Life as a university student can be challenging physically, mentally and emotionally. Students who find stress negatively affecting their ability to achieve academic or personal goals may wish to consider utilizing FAU's Counseling and Psychological Services (CAPS) Center. CAPS provides FAU students a range of services – individual counseling, support meetings, and psychiatric services, to name a few – offered to help improve and maintain emotional well-being. For more information, go to <http://www.fau.edu/counseling/>

Disability Policy

In compliance with the Americans with Disabilities Act Amendments Act (ADAAA), students who require reasonable accommodations due to a disability to properly execute coursework must register with Student Accessibility Services (SAS) and follow all SAS procedures. SAS has offices across three of FAU's campuses – Boca Raton, Davie and Jupiter – however disability services are available for students on all campuses. For more information, please visit the SAS website at www.fau.edu/sas/.

Code of Academic Integrity

Students at Florida Atlantic University are expected to maintain the highest ethical standards. Academic dishonesty is considered a serious breach of these ethical standards, because it interferes with the university mission to provide a high quality education in which no student enjoys an unfair advantage over any other. Academic dishonesty is also destructive of the university community, which is grounded in a system of mutual trust and places high value on personal integrity and individual responsibility. Harsh penalties are associated with academic dishonesty. For more information, see [University Regulation 4.001](#).

If your college has particular policies relating to cheating and plagiarism, state so here or provide a link to the full policy—but be sure the college policy does not conflict with the University Regulation.

Required Texts/Readings

Textbook: *Marketing Strategy and Competitive Positioning*, 7th Edition, by Hooley, Nicoulaud, Rudd, and Lee. ISBN: 978-1292276540

Case Studies: Case studies are either included in the textbook or provided by the instructor.

Lectures: All lectures will be recorded and uploaded on CANVAS, and could be accessed unlimitedly. PowerPoint slides are also uploaded. Slides are offered as a service and students should not expect to use them as a substitute for lectures.

Course Topical Outline

id	Day	Date	Topic	Essential Reading	Project Phase	Note	
1	WED	1/10	Course Overview		Phase 0	Group Formation	
2	FRI	1/12	Marketing Review Marketing Research Data Sources	Chapter 1	Phase 1		
3	WED	1/17	Case #1 Discussion		Phase 2	Case #1 Individual Report Due 1:30 pm	
4	FRI	1/19	21 st Century Marketing	Chapter 18			
5	WED	1/24	Case #2 Discussion: Case #3 Discussion		Phase 3	Case #2 Group Report Case #3 Group Report Due 1:30 pm	
6	FRI	1/26	Environment Analysis 1: Five Forces	Chapters 2,3 & 5			
7	WED	1/31	Case #4 Discussion		Phase 4	Case #4 Individual Report Due 1:30 pm	
8	FRI	2/2	Environment Analysis 2: SPACE	Chapters 2,3 & 5			
9	WED	2/7	Case #5 Discussion		Phase 5	Case #5 Group Report Due 1:30 pm	
10	FRI	2/9	Environment Analysis 3: SWOT	Chapters 2,3 & 5			
11	WED	2/14	Case #6 Discussion		Phase 6	Case #6 Group Report Due 1:30 pm	
12	FRI	2/16	Organizational Resources	Chapter 6			
13	WED	2/21	Case #7 Discussion		Phase 7	Case #7 Group Report Due 1:30 pm	
14	FRI	2/23	Midterm Exam Review	Chapters: 1,2,3,5,6,and 18			
15	WED	2/28	Midterm Exam – Online -- Duration: 80 minutes				
16	FRI	3/1	Segmentation, Targeting and Positioning	Chapters 4,7,8 & 9	Phase 8		
	WED	3/6	Spring Break				
	FRI	3/8	Spring Break				
17	WED	3/13	Case #8 Discussion			Case #8 Group Report Due 1:30 pm	
18	FRI	3/15	Competitive Advantage				
19	WED	3/20	Case #9 Discussion	Chapter 10		Case #9 Individual Report Due 1:30 pm	
20	FRI	3/22	New Marketing Mix		Phase 9		
21	WED	3/27	Case #10 Discussion	Chapter 11		Case #10 Group Report Due 1:30 pm	
22	THU	3/29	Customer Relationships				
23	WED	4/3	Case #11 Discussion	Chapter 13		Case #11 Group Report Due 1:30 pm	
24	FRI	4/5	Implementing the Strategy		Phase 10		
25	WED	4/10	Case #12 Discussion	Chapter 16		Case #12 Individual Report Due 1:30 pm	
26	FRI	4/12	Final Project Discussion				
27	WED	4/14	Final Project Discussion		Phase 11		
28	FRI	4/19	Final Exam Review				
30	WED	5/1	Final Exam – 7:45 am – 10:15 am – Duration: 110 minutes				Marketing Plan: Final Report Due 11:59 pm