



The Aubrey Dan Program in

MANAGEMENT and  
ORGANIZATIONAL STUDIES

## Marketing for Management and Organizational Studies

Course Number: MOS3320

The course outline and schedule are subject to change at the discretion of the course instructor.

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### Course Information

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Course Name:	Marketing for Management and Organizational Studies
Course Number:	3320 (Summer Intersession 2011)
Location, Time:	Mondays and Wednesdays 11:00 a.m. – 2:00 p.m. (location: SSC 3028)

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### Instructor Information

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Instructor:	Dr. Wonkyong (Beth) Lee ( Ph.D.) <i>Assistant Professor, MOS Program</i>
Office:	SSC-7430
Office Telephone:	519-661-2111. Extension 89217 [MOS Office: 519-661-2051]
e-mail:	<a href="mailto:wlee322@uwo.ca">wlee322@uwo.ca</a>
Course website	WEB-CT-OWL MOS3320 (Dr. Beth Lee) <a href="http://webct.uwo.ca/">http://webct.uwo.ca/</a> (click location, log-in, click appropriate section)
Office Hours:	Mondays            2:00 p.m. – 3:00 p.m. Wednesdays      2:00 p.m. – 3:00 p.m. <i>Other times by appointment (via email: wlee322@uwo.ca)</i>

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### Required Text

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**Principles of Marketing, 8<sup>th</sup> Canadian Edition** (Kotler, Armstrong, Cunningham, Trifts), 2011, Pearson Canada, ISBN: 978-0-13-508457-1

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## Course Description & Objectives

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**Course Description:**

An introduction to the role of marketing in the organization and society (0.5 course and 3 lecture hours weekly).

**Prerequisites: Business Administration 2257 and enrolment in the BMOS program.**

*"Unless you have either the requisites for this course or written special permission from your Dean to enrol in it, you will be removed from this course and it will be deleted from your record. This decision may not be appealed. You will receive no adjustment to your fees in the event that you are dropped from a course for failing to have the necessary prerequisites."*

**Course Objectives:**

Welcome to Marketing for MOS! This course is designed to introduce the field of marketing to the program student. The course takes a global perspective and focuses on the role of marketing in society and on its relevance to the firm, organization, and individual. The course lectures, class discussions, classroom activities, reading assignments, video presentations, and the group marketing project will provide the student with the opportunity to learn the concepts and theories of the subject area and to apply this knowledge in a systematic and logical manner. The concepts learned are applied to realistic marketing problems in a host of business settings, including for-profit and not-for-profit firms, as well as small business organizations and institutions, within domestic and international contexts.

Class sessions will be devoted to applying and extending the material in the assigned readings. It the responsibility of each student to be prepared for each session as detailed in the course outline.

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## Mid-Term & Final Exam

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There will be a mid-term test and a final exam in the course, representing 25 and 40 percent of your final grade for this course, respectively. Both can include multiple-choice, fill-in-the-blank, short answer, cases, and/or short essay questions. Questions can pertain to any of the material covered during the course with respect to the relevant topic areas, including those topics contained in the text, video presentations, and class discussions/activities. The mid-term and final exams are closed-book. Although the final exam is not cumulative (i.e., will not have questions directly based on pre-midterm materials), knowledge in marketing theory is cumulative; therefore students are expected to have a detailed understanding the importance and relevance of terms/concepts, etc. covered in the first half of the course.

Dates of Mid-Term Test, and Final Exam	
<b>Mid-Term</b>	Wednesday, June 1 <sup>st</sup> - <i>in class</i> (120 minutes)
<b>Final Exam</b>	Date/Time/Place: _____/_____/_____ (3 hours) <i>To take place sometime during final exam period (June 27 &amp; 28, 2011)</i>

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## **Group Project: Creating a Marketing Plan (groups of 3-5 members)**

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The objective of the term project is to provide you with experience in applying the concepts and methods of marketing to a real-world marketing opportunity, in the form of a marketing plan. The group term project paper will foster teamwork, enhance the realism of the learning experience, and sharpen decision-making skills.

The group project is worth **25% of your final grade**: this grade consists of **10% for presentation** and **15% for the final paper**. Following a thorough analysis of the marketing situation, each team will create a marketing plan for a 'new' product or service, in an existing product/service category. For your product or service, you may choose one of the following options:

**Option 1 (Market development option):** Find an existing product or service that is successful in a foreign country, which is **not** currently available in Canada. Your task would be to introduce this product/service to the Canadian market.

**Option 2 (Entrepreneurial option):** Develop a new product or service, in an existing product/service category. Please note that existing brand names cannot be used.

**Project Deadlines:** There are **three** deadlines, so please mark them down in your agendas.

1. Your first task is to form groups of no fewer than 3 members and no more than 5 members. By **May 18 (Wednesday)**, one member from each group must send the professor ([wlee322@uwo.ca](mailto:wlee322@uwo.ca)) an email containing the names and valid email addresses of each group member. Students not being a member of a group by **May 18** will be arbitrarily grouped by the professor by the following class. Group members are responsible for exchanging relevant contact information with one another (e.g., telephone numbers, email addresses, availabilities, etc.).
2. Each team must then hand in a 1-page report (consisting of a description of, and rationale for choosing the product/service) on **May 30**, in order to obtain the professor's approval and feedback. The more information that you provide, the more feedback I can offer. During the course of the semester, you are encouraged to meet with the professor *at least* once for advice. NOTE: No proposals will be approved after **May 30**, resulting in a grade of "0" being assigned to this portion of the course.
3. The complete project is due on **the last day of class (June 22)**. Each group must hand in one paper copy *and* 1 electronic copy (on CD-ROM), of the complete project. There are no exceptions to this requirement, and **no late submissions will be accepted**.

**Evaluation:** In grading your project, I will pay close attention to the realism, clarity, thoroughness, and originality of the marketing plan. All team members should participate equally; you will have the opportunity to confidentially evaluate the contributions made (or lack thereof) of fellow team members, with a formal peer-evaluation form (see template included in this syllabus). Note that the professor will incorporate this feedback in assigning the grade for each student in the group. In other words, the grade assigned to the group as a whole may be adjusted downwards for any team member(s) deemed by their fellow group members as making an insufficient contribution.

### **Special Instructions:**

1. Projects should represent a professional effort, in content, structure, and presentation. A good way to think about this project is to imagine that your team will actually be implementing this plan for real; alternatively you might imagine that your team has been hired as consultants, in order to develop a marketing plan (Consider this to be a real world assignment...the report will be scored in large part on the professor's perception of the usefulness and acceptability of the report to a real client).
2. Include a cover page, and ensure that each team member's name, and student ID, are on the handed-in project. Each team must hand in two (2) identical paper copies of the project, along with a CD-ROM electronic copy (do not send as an attachment to professor!).
3. You are encouraged to refer to the handouts distributed in class (and/or posted on the course WEB-CT website) as well as materials in the text, for hints on analytical methods and formatting.
4. You are expected to do outside secondary research for this project. This would include, for example, finding and analyzing demographic information that is related to the size/location of the target markets for this product or service, information on the competition, distribution channels, promotional options and costs, etc. This may also include relevant academic and/or trade journal sources. You must provide proper citations for all sources.
5. Assume current (2011) dollars throughout. Clearly state the rationale (and/or source) behind any other assumptions that you may make. Cite all sources of information (i.e., provide references): ALL facts in the report must be substantiated except those that are obviously common knowledge. Use footnotes/endnotes where necessary, and include a bibliography. Ensure that all material included is relevant and appropriate for the situation at hand.
6. Total length of the project (not including Appendices, Exhibits, References, and Cover Page) is not to exceed 20 typed, double-spaced pages (note that 'bulleted items' do not require double spacing). Use 'Arial' or 'Times New Roman' non-condensed size-12 fonts, with 1-inch margins.

### **Presentation:**

The group presentations are scheduled on **June 22**. Present your group project in class: 15 minute oral group presentation followed by a 5-minute Q & A session.

### **Detailed Outline and Format for the Marketing Plan:**

- **(in order) Cover page, Executive summary (1 page), Table of Contents (1 page)**. The executive summary, which precedes the table of contents, presents a brief summary of the main goals and recommendations of the plan for management review, helping top management to find the plan's major points quickly.
- **Introduction (approximately 2 pages)**. All projects must have some sort of introduction that explains the nature, focus, and objectives of the report to the reader. In addition, if following the market development option, you should include a brief description of the company and product/service that you are focusing on (e.g., history/background, mission statement, major products/divisions, etc.). With respect to the 'new' product or service, state the main marketing objectives that your team would like to attain during the term of the marketing plan, and mention any key issues (i.e., major constraints) that will affect their attainment. Irrespective of the option chosen, you must concisely make a compelling case for proposing this marketing opportunity.
- **Analysis of the Marketing Situation (approximately 7 pages, excluding any associated appendices)**. The use of point-form is appropriate here, so long as each point listed is clearly phrased *and* interpreted. Please use appropriate subheadings to organize your assessment of the following:
  - *Relevant factors and trends* of the demographic environment, cultural and social environment, the economic environment, the technological environment, the political and legal environment (if applicable), natural and ecological environments (if applicable), etc.
  - *Competitor analysis*, such as defining direct and indirect competitors, what is the likelihood of new competition, what is the intensity of competition, what are specific competitors' advantages and

disadvantages, competitive barriers that need to be overcome, areas of potential competitive advantage, etc.

- *Customer analysis* (organizational and/or final consumer), including evaluating possible segmenting dimensions (customer needs, consumer behaviours, and other characteristics that form the bases for segmentation), identifying and profiling possible target market(s) as relating to the specific product-category under consideration (operational characteristics, potential size, and likely growth).
- *Company analysis*, including company objectives and overall marketing activities, company resources (e.g., management skills and competencies, finances, human resources, and other resources, etc.).
- *SWOT analyses*: identification of the major strengths, weaknesses, opportunities, and threats (based on the above analyses of company resources, customers, competitors, and other aspects of the external marketing environment).

• **Strategy and Recommendations (approximately 6 pages, excluding any associated appendices).** On the basis of your situational analysis, generate a marketing strategy (give your strategy a descriptive label). This should include the following components (of the three below subsections, please note that the marketing strategy is the most important):

- *Marketing Strategy*. Clearly state the marketing objectives of your strategy, the generic and narrow product-market(s) that you will be targeting (include a profile of your intended target market[s]), positioning statement, and most importantly, the marketing mix(es) of your strategy. In crafting your marketing mix(es), provide a detailed description and (if necessary, justification) for each element (point form is OK here):
  - Product (decisions about everything the target group receives)
  - Price (decisions about everything the target group gives up to receive it)
  - Place (decisions about everything that is done to get the product to the target group)
  - Promotion (decisions about everything that is done to communicate the other three elements to the target group)
- *Financial Assessment and Budget*. Estimate the market potential for your product/service, in the short-, and medium-terms. What is the impact on the 'bottom line' of your strategy? That is, briefly discuss key figures, including projected revenues, expenses, profits (losses), breakeven analysis, market share, etc. Show details and calculations in the appendix section but extract and discuss key figures in the main part of your project. You may also want to assess trends and/or make forecasts over the long-term.
- *Pros and Cons*. Briefly reiterate the qualities and shortcomings of your proposed strategy (for example, on the basis of such aspects as impact on the bottom-line, match to core competencies of the firm, viability [given resources, skills, etc.], potential competitors' responses, etc.).

• **Implementation and Control (approximately 3 pages).** Implementation consists of your action plan—it spells out, according to a detailed time frame, how the marketing strategy will be launched into the marketplace (i.e., what has to be done, when, how, how much, who is responsible for doing it, additional resources required, obstacles to overcome, etc.). Are there any special implementation problems that need to be overcome? Finally, briefly outline the controls that will be used to monitor progress of the strategy and allow management to review and/or readjust the strategy.

• **Appendices.** Put all supporting calculations, graphs, tables and charts, in this section. It is critical that you extract and discuss key the findings from your calculations into the main body of your project. Similarly, in the main body of your project, clearly direct the reader towards the supporting calculations, where appropriate. There is no page limit on the number of Appendices, but they must all be relevant to the marketing plan.

• **References.** List all sources of information.

**Group Project Peer Evaluation:** Just to give you an idea how this works, below is a sample peer evaluation form (I will hand out separate paper forms during the course of the semester).

**PEER REVIEW FORM: GROUP TERM PROJECT**

*MOS 3320 (Marketing for MOS), Prof.: Beth Lee*

You have the opportunity to evaluate your group members' contributions to the group project (both presentation and the final paper). This also means that your contribution will be evaluated by your peers. If it turns out that your contribution is substantially lower than your peers, you may not receive full credit for group work.

Your Name \_\_\_\_\_

Name of your project \_\_\_\_\_

Section Number \_\_\_\_\_

1. Overall, how effectively did your group work together on this project?

Poorly

Adequately

Well

Extremely Well

2.1. Please list the members of your group **including you**; then,

2.2. Please assign a percentage of the group's effort to each member (the total for all the members together should equal 100%: for example, Dick 30%+Jane 30%+Puff 20%+Spot 20%=100%).

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## Case Report

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A case study is designed to give you a chance to apply concepts and theories you have learned in this course to a “real world” context.

A case study allows you to practice: (1) determining the facts of the case; (2) making inferences from the facts to more fully understand the dynamics of the situation; (3) defining the problem facing the organization in the case; (4) determining optional solutions; (5) determining decision criteria; (6) analyzing and assessing the optional solutions based on the decision criteria; and (7) making an optimal decision.

The case material will be announced in class on **May 18**. You are required to write a 3-4 page case report for the case. The report should be typed with one-inch margin, double-spaced, using a 12-point font. The report is due on **June 8<sup>th</sup> 2011**. The report should be submitted online to the course website. **Late submissions will NOT be accepted for grading.**

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## Grading

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The following weights will be assigned for each course evaluation component:

Grading Weights for Evaluation Components	
Mid-Term Exam	25%
Final Exam	40%
Marketing Plan Group Project	25%
Case Report	10%
Total	100%

The following are the grade categories for the course from the *Academic Calendar*:

Grade Categories	
<b>A+</b>	90%+
<b>A</b>	80 - 89%
<b>B</b>	70 - 79%
<b>C</b>	60 - 69%
<b>D</b>	50 - 59%
<b>F</b>	Below 50% or assigned when course is dropped with academic penalty

**No late submissions of any course material will be accepted, unless there are acceptable (to the course instructor) extraordinary circumstances.**

**New Western Medical Accommodation Policy on Medical Notes:** A Western Student Medical Certificate (SMC) is required where a student is seeking academic accommodation. This documentation should be obtained at the time of the initial consultation with the physician or walk-in clinic. An SMC can be downloaded under the Medical Documentation heading of the following website: <https://studentservices.uwo.ca/secure/index.cfm>. Hard copies are available from the student's home Faculty Academic Counselling Service.

**Plagiarism:** *"Students must write their own essays and assignments in their own words. Whenever students take an idea, or a passage from another author, they must acknowledge their debt both by using quotation marks where appropriate and by proper referencing such as footnotes or citations. Plagiarism is a major academic offence."* (see Scholastic Offence Policy in the Western Academic Calendar)."

**Plagiarism Checking:** *"All required papers may be subject for textual similarity review to the commercial plagiarism software under license to the University for the detection of plagiarism. All papers submitted will be included as source documents in the reference database for the purpose of detecting plagiarism of papers subsequently submitted to the system. Use of the service is subject to the licensing agreement, currently between the University of Western Ontario and **Turnitin.com** (<http://www.turnitin.com>)."*

**Academic Cheating:** *"Computer-marked multiple-choice tests and/or exams may be subject to submission review by software that will check for unusual coincidences in answer patterns that may indicate cheating."*

**Other Relevant Academic Policies/Regulations:** *All students are advised to refer to the Academic Calendar and other relevant documentation for other relevant academic policies and regulations (e.g., academic cheating, attendance, etc.).*

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## Code of Behaviour

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Students are expected attend all classes, and to remain in attendance throughout the entire class. It is also expected that students will remain focussed on the activities during the class. **Disruptive talking will not be tolerated. If you bring a laptop/handheld device to class and decide to check email/chat/surf, etc., you will be asked to leave the room.** If you, as an individual student, find it necessary to leave the classroom during a lecture and/or presentation, do so quietly (i.e., for an emergency that cannot wait until the end of the class). If you return to a class that is still in progress, do so quietly. Groups of students leaving (and/or returning) together while a class is in progress will not be tolerated. Research shows that failure to attend class can have a negative impact on one's grade. All students are responsible for all course material.

**Cell phones shall not be used (nor should they be left on) during class.**



## Course Outline Schedule

The course outline and schedule are subject to change at the discretion of the course instructor.

Dates	Topic	Textbook Readings
<b>MODULE 1: MARKETING FUNDAMENTALS</b>		
<b>Class 1</b> <b>May 16</b>	1. Introduction to course – Review of course syllabus 2. Marketing: Creating/Capturing Customer Value 3. Social Responsibility and Ethics	1, 4
<b>Class 2</b> <b>May 18</b>	1. Marketing's Role in the Firm 2. Marketing Strategy 3. Marketing Research  <b>Note: Group lists for term project due</b>	2, 5
<b>Victoria Day (May 23) No Scheduled Class</b>		
<b>MODULE 2: THE MARKETING ENVIRONMENT</b>		
<b>Class 3</b> <b>May 25</b>	1. Analyzing the Marketing Environment 2. Market Segmentation, Differentiation, and Positioning	3, 8
<b>Class 4</b> <b>May 30</b>	1. Consumer Behaviour (B2C) 2. Briefing on Midterm Format, Q&A (if time permitting)  <b>Note: 1-pg. summary of marketing plan due</b>	6
<b>Class 5</b> <b>June 1</b>	<b>IN-CLASS MID-TERM EXAM (120 minutes):</b> <b>Ch.'s 1,2,3,4,5,6,8 and all in-class materials/discussions</b>	<b>EXAM</b>
<b>Class 6</b> <b>June 6</b>	1. Product and Service Planning 2. Branding	9
<b>MODULE 3: THE MARKETING MIX</b>		

<p><b>Class 7</b> <b>June 8</b></p>	<p>1. New Product Development 2. Product Lifecycle</p> <p><b>Note: Case Report Due</b></p>	<p>10</p>
<p><b>Class 8</b> <b>June 13</b></p>	<p>1. Place: Marketing Channels 2. Retailing and Wholesaling 3. Discussing Group Project Progress</p>	<p>12, 13</p>
<p><b>Class 9</b> <b>June 15</b></p>	<p>1. Pricing 2. Promotion: Integrated Marketing Communications</p>	<p>11, 14</p>
<p><b>Class 10</b> <b>June 20</b></p>	<p>1. Advertising and Public Relations 2. Personal Selling and Sales Promotion 3. The Global Marketplace and Modifying the Marketing Mix</p>	<p>15,16,19</p>
<p><b>Class 11</b> <b>June 22</b></p>	<p>1. Group Project Presentations</p> <p><b>Note: Written Group Project (Marketing Plan) Due</b></p>	
<p><b>TBA</b></p>	<p><b>Final Exam – Ch. 9, 10, 11, 12, 13, 14, 15, 16, 19 and in-class materials and discussions</b></p>	

## **GENERAL INFORMATION**

If, on medical or compassionate grounds, you are unable to meet your academic responsibilities, i.e., unable to write term tests or final examinations or complete course work by the due date, you should follow the instructions listed below. You should understand that academic accommodation will not be granted automatically on request. You must demonstrate that there are compelling medical or compassionate grounds that can be documented before academic accommodation will be considered. Read the instructions carefully. In all cases, action must be taken at the earliest possible opportunity, preferably prior to the scheduled examination, test or assignment.

1. Check the course outline to see if the instructor has a policy for missed tests, examinations, late assignments or attendance. The course outline should include the preferred method of contact (e-mail, phone, etc.).
2. Inform the instructor prior to the date of the scheduled time of the test or examination or due date of the assignment. If you are unable to contact the instructor, leave a message for him/her at the department office.
3. Bring your request for accommodation to the Social Science Academic Counselling Office, Room 2105, Social Science Centre, telephone 519 661-2011 or fax 519 661-3384. Be prepared to submit documentation of your difficulties.
4. If you decide to write a test or an examination you should be prepared to accept the mark you earn. Rewriting tests or examinations or having the value of the test or examination reweighted on a retroactive basis is not permitted.

## **MID-TERM EXAMINATION**

1. If you are unable to write a mid-term examination, inform your instructor prior to the scheduled date of the exam. If the instructor is not available, leave a message for her at the department office.
2. Be prepared, if requested by the instructor, to provide supporting documentation. Submit your documentation to the Social Science Academic Counselling Office.
3. Make arrangements with your professor to reschedule the exam.
4. The Academic Counselling Office will contact your instructor to confirm your documentation.

## **FINAL EXAMINATION**

1. You require the permission of the Dean, the instructor, and the Chair of the department in question to write a special final examination.
2. If you are unable to write a final examination, contact the Social Science Academic Counselling Office in the first instance to request permission to write a special final examination and to obtain the necessary form. You must also contact your instructor at this time. If your instructor is not available, leave a message for him/her at the department office.
3. Be prepared to provide the Social Science Academic Counselling Office and your instructor with supporting documentation.
4. You must ensure that the Special Examination form has been signed by the instructor and Department Chair and that the form is returned to the Social Science Academic Counselling Office for approval without delay.

## **LATE ASSIGNMENTS**

1. Advise the instructor if you are having problems completing the assignment on time (prior to the due date of the assignment).
2. Submit documentation to the Social Science Academic Counselling Office.
3. If you are granted an extension, establish a due date.
4. Extensions beyond the end of classes must have the consent of the instructor, the Department Chair and Dean. A Recommendation of Incomplete form must be filled out indicating the work to be completed and the date by which it is due. This form must be signed by the student, the instructor, the Department Chair, and the Dean=representative in the Academic Counselling Office.

## **SHORT ABSENCES**

If you miss a class due to a minor illness or other problems, check your course outlines for information regarding attendance requirements and make sure you are not missing a test or assignment. Cover any readings and arrange to borrow notes from a classmate.

## **EXTENDED ABSENCES**

If you are absent more than approximately two weeks or if you get too far behind to catch up, you should consider reducing your workload by dropping one or more courses. This must be done by the appropriate deadlines. (Refer to the Registrar's website for official dates.) The Social Science Academic Counsellors can help you to consider the alternatives. At your request, they can also keep your instructors informed of your difficulties.

## **DOCUMENTATION**

**Personal Illness:** If you consulted Student Health Services regarding your illness or personal problem, you should complete a Records Release Form at the time of your visit allowing them to notify Social Science Academic Counselling Office. Once your documentation has been assessed, the academic counsellor will inform your instructor that academic accommodation is warranted.

- If you were seen by an off-campus doctor, obtain a certificate from his/her office at the time of your visit. The doctor must provide verification of the severity of the illness for the period in question. Notes stating "For Medical Reasons" are not considered sufficient.
- In Case of Serious Illness of a Family Member: Obtain a medical certificate from the family member's physician.
- In Case of a Death: Obtain a copy of the newspaper notice, death certificate or documentation provided by the funeral director.
- For Other Extenuating Circumstances: If you are not sure what documentation to provide, ask an Academic Counselor.

**Note:** Forged notes and certificates will be dealt with severely. To submit a forged document is a scholastic offense and you will be subject to academic sanctions.

## **ACADEMIC CONCERNS**

- You need to know if your instructor has a policy on late penalties, missed tests, etc. This information may be included on the course outline. If not, ask your instructor.
- You should also be aware of attendance requirements in courses such as Business and English. You can be debarred from writing the final examination if your attendance is not satisfactory.
- If you are in academic difficulty, check the minimum requirements for progression in your program. If in doubt, see your Academic Counsellor.
- If you are registered in Social Science courses but registered in another faculty (e.g., Arts or Science), you should immediately consult the Academic Counselling Office in your home faculty for instructions.