



Sem: SP 2020

Class Day/Time: Wednesdays, 4:10pm to 7:10pm

Room: Schoenbaum Hall 305

Instructor: Dale Anne Davidson

E-mail: Davidson.399@osu.edu

Office Hours: By appointment (TU/TH Afternoon, or via Zoom by appointment)

Version: V.010420

### Course Description:

Marketing Projects is a capstone learning experience and semester-long competition that activates your marketing education at The Fisher School of Business. It is an opportunity to integrate and apply everything you've learned to date in diagnosis, analysis, research, and making strategic and tactical recommendations for your client.

In this course your team will take the perspective of a project team working within a marketing consulting firm. True marketing consulting firms are well-versed and competent in all aspects of marketing strategy and tactics as opposed to one narrow area such as PR or social media. This means they are skilled in aiding clients across various marketing domains including segmentation, targeting, positioning, the traditional "4Ps," branding, managing customer loyalty, and mining customer insights for innovation.

You will work in a team of 5 – 6 on a real-world, "live" project. Your task is to develop the following deliverables:

1. A comprehensive marketing implementation plan for a client organization
2. A fully developed set of sample tactical elements that will be utilized within the plan
3. Research insights, findings and other analyses to support your recommendations
4. A final presentation to your client, communicating in a compelling fashion your insights, strategy, and recommended plan of action.

Like most disciplines, there are few hard and fast "rules" and "established procedures" in marketing. This will become especially obvious in this course. You will move beyond looking for "the right answer" and instead embrace a strategic approach to marketing problem-solving. The real-world "live" project is an opportunity to accomplish exactly this.

**Pre-Requisites:** 4201 – Consumer Behavior (750), 4202 – Marketing Research (758), or enrollment in regional campus General Business Program

**Course Format:** In-class Project Update Meetings + Team Meetings. We will meet as a class for only THREE designated class sessions (see the course timeline). The remainder of the classes will be weekly meetings. Teams will meet with the course instructor at regular intervals during an assigned meeting time.

**Required Texts/Materials:** None. Class materials (including the project brief and other client-provided resources) will be posted on Carmen, as and when necessary.

### Evaluation Criteria:

Graded Components	% of Total	Type
Marketing Plan & Support Materials	30%	C 🧑🧑🧑
Final Presentation Effectiveness	20%	C 🧑🧑🧑
Peer Evaluation	20%	N 📈
On-course Project Progress (weekly status)	30%	N 📈

Requirements for each form of graded component.

Failing to follow these will represent academic misconduct. See below.

**Independent Work [N 📈]:** Strictly non-collaborative, original individual work. You may discuss this assignment with your instructor only. Discussions with other individuals, either in person or electronically, are strictly prohibited.

**Collaboration Required [C 🧑🧑🧑]:** An explicit expectation for collaboration among students either in class or outside of class (i.e. team work).

**Collaboration Optional [O 📈]:** Students are permitted, but not required, to discuss the assignment or ideas with each other. However, all submitted work must be one's original and individual creation.

(See remaining pages for Details/Due dates)

**NOTE: Individuals who receive less than 80% Peer Evaluation (as an average of all teammates' evaluations) will receive only 80% credit of the team graded components.**

### Academic Conduct:

If a student is suspected of, or reported to have committed, academic misconduct in this course, I am obligated by University Rules to report my suspicions to COAM. If you have questions about the above policy or what constitutes academic misconduct in this course, please contact me. See OSU Prohibited Conduct – [Section 3335-23-04\(A\)](#)

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University Policies, Services  
and Resources  
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Fisher Undergraduate  
Handbook and QuickLinks  
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Resource Portal  
([www.nav-1.com](http://www.nav-1.com))



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### Learning Goals and Objectives:

From this course you will:

- Develop critical analysis and problem-solving abilities with respect to managing the marketing process.
- Gain first-hand experience in developing a comprehensive, integrated marketing implementation plan.
- Develop collaborative skills and expertise, working as part of a high-functioning team in a high-stakes competitive environment.

### Team Formation

You will have an opportunity to form your own team of five or six students in the first class session. Any student not in a team by the end of that class session will be assigned a team, by the instructor, based on the number of students in each of the teams. It is expected that students in a team have different class and work schedules. However, it is extremely crucial for each team to manage meeting times, and effectively delegate work among team members to ensure smooth progress on the project.

### Graded Component Details

#### **Marketing Plan & Supporting Materials: 30% of the Final Grade**

The marketing plan that you develop based on your research, analysis, strategy development, and recommendations should follow the outline provided on Carmen in the Course Documents Module. This final document will include the final presentation slides that you present to the client along with detailed appendix slides that provide additional background and support for your recommendations. This document will be printed and provided to the client on the day of the presentation.

#### **Presentation Effectiveness: 20% of the Final Grade**

A crucial skill in any marketing role is the ability to clearly and persuasively communicate information. This portion of the grade is related to the actual live presentation to the client and will be evaluated on dimensions including clarity, persuasiveness and professionalism. The specific presentation grading criteria is included on Carmen in the Course Documents Module.

#### **Peer Evaluation: 20% of the Final Grade**

Team collaboration and participation is an important element of this class and will affect the quality of final deliverables. Each team member will provide a performance evaluation of the other members. Lack of effort and contribution to the project by a team member will be reflected in the individual peer evaluations and will negatively affect that individual's overall grade for the course. Individuals who receive less than 80% Peer Evaluation (as an average of all evaluations) will receive only 80% credit of the Team Project grade.

It is important that Peer Evaluation scores are determined based on objective criteria rather than personal opinion. It is normal for team members to have different approaches, personalities, and opinions so your team will need a clear framework for how you will work together and the expectations of performance. One of the first tasks your team will have will be to develop and submit a Team Charter. The performance expectations laid out in this charter will be the basis for your Peer Evaluation scores at the end of the semester.

The template for the Team Charter is posted on Carmen in the Course Documents Module. An electronic version of the completed Charter must be submitted in Carmen and a printed & signed version must be turned in to the instructor by the second class.

**Project Progress: 30% of the Final Grade (20% Collaboration / 10% Independent)**

An effective marketing consulting team works in a disciplined way to structure the project, conduct primary and secondary research, analyze the research, formulate strategy and make strategic and tactical recommendations. This process requires consistent work at a high level of competence and efficiency. Pulling it all together at the very last minute does not translate to a strong project. Based on your regular meetings with the instructor and updates of your progress, the instructor will evaluate each team on how consistent and on-schedule your team’s performance was throughout the project. This will be based on preparedness for meetings and on-time completion of milestone documents throughout the semester. There will be submissions due prior to every meeting and teams will also be required to submit weekly meeting minutes following the status meetings with the professor. Refer to the Assignment area in Carmen for details on these submissions. Failure to meet submission deadlines will affect this portion of the grade.

In addition, individuals can lose points via unexcused absences, lack of preparation for team meetings, and not adding value to team discussions during meetings with the instructor.

**Grading Scale**

Letter	A	A-	B+	B	B-	C+	C	C-	D+	D	E
(Points)	(4.0)	(3.7)	(3.3)	(3.0)	(2.7)	(2.3)	(2.0)	(1.7)	(1.3)	(1.0)	(0.0)
Range	100% - 93%	90% - 87%	83% - 80%	77% - 73%	70% - 67%	60% - 0%					

*Note: Above percentages are % of overall points earned*

**Additional Policies**

To maintain the highest professional standards expected of a senior-level class that offers a capstone experience, the following attendance and classroom policies have been designed for this course -

- Attendance is mandatory for the three sessions that we meet as a class. **Students who miss the first-class session will be dropped from the class, NO EXCEPTIONS.** If you anticipate being absent for the first class session, please talk to your undergraduate advisor to enroll in another course.
- Attendance will be taken for each team meeting and calculated as part of your grade via project progress grade component. Excused absences will be made for **ONE** out-of-town job interview, illness supported with physician note, death of an immediate family member.
- ALL late submissions will receive a 50% grade point deduction** for each day it is late. No exceptions.
- Weekly submissions are worth up to 2 points. If submitted work is not complete, and if the team does not adequately review the team’s progress for the past week, there will be a deduction of 1-2 points.**
- Client status update is March 4 and is mandatory attendance. A 10-point deduction will be taken from the student’s progress grade if the client status update is not attended.
- Final dress rehearsal, April 7, 8, or 9, time TBA, is mandatory attendance. A 10-point deduction will be taken from the student’s progress grade if dress rehearsal is missed.
- Much of this course will be 25-minute weekly meetings with the instructor to review progress and action plan. Each team member is expected to attend these meetings at your allotted time, engage, and participate. Given these meetings

will be back-to-back between teams, it is crucial to begin and end on time. The entire team must be outside of my office (347 Fisher Hall) at least 5 minutes before your starting time. The instructor will notify your team when to come in.

- For each of the class sessions (see the course timeline below), be sure to arrive on time. If you are going to be over five minutes late, or need to leave early for a specific reason, please get prior permission and present necessary documentation. You should notify both the professor and your team members of any planned absence well in advance. Students who are late to the weekly status meeting with the professor will lose points in the Project Progress score.
- Food and drink consumption. Please minimize the consumption of food or drinks (except water) during class.
- Use of technology during status meetings. These meetings are meant for your team's benefit. During our meeting time, there will be no use of cell phones unless it is relevant to the project discussion. Laptops should only be used for note taking or project-related activities.
- Please be professional and courteous in your communication with the client, with other team members, and with the instructor.

### Class Work Load and Expectations

The University and College expectation is that students spend two hours outside of class for every hour spent in class. **Since this course meets three (3) hours per week, you should expect to spend six (6) hours per week outside of class on course-related work.** This means that every student is expected to spend a total of nine (9) hours per week on this project. Please plan your project team work and individual responsibilities within the project team, accordingly.

**Course-specific Copyright Policy:** Material provided by the instructor may not be re-posted anywhere without the explicit permission of instructors. See University Copyright Policy.

### Course Timeline & Activities

*Shaded weeks we meet as an entire class in Schoenbaum Hall 220*

*RED font indicates Carmen submissions (late submissions will impact project progress grade)*

*Meeting minutes DUE each Friday, Noon*

*All assignments are to be submitted via Carmen (refer to individual Carmen assignments for detailed information)*

Date	Discussion Topics	Details & <i>Deliverables (due in Carmen before meetings)</i>
WK 1: 1-8-20	Course introduction, team formation, and client briefing	<ul style="list-style-type: none"> <li>▪ Meet in 305 Schoenbaum Hall, 4:10pm to 7:10pm</li> <li>▪ Client will join us during first half of class to present project overview</li> <li>▪ Students form their own teams</li> <li>▪ Teams to begin work on secondary research</li> <li>▪ <b>Headshot photos due 1-10-20</b></li> </ul>
WK 2: 1-15-20	Review and discuss secondary and primary research, insights, strategy, tactics, and present samples from previous projects.	<ul style="list-style-type: none"> <li>▪ Meet in 305 Schoenbaum Hall, 4:10pm to 7:10pm</li> <li>▪ Teams register for dress rehearsal times</li> <li>▪ Research methodology discussion</li> <li>▪ Utilize <i>5C Analysis Input</i> document in Carmen</li> <li>▪ <b>Submit DRAFT of Secondary Research Report by end of class</b></li> <li>▪ <b>Submit Team charter due by end of class</b></li> <li>▪ <b>Meeting minutes due NOON, Friday</b></li> <li>▪ Refer to Carmen assignment for detail</li> </ul>

WK 3: 1-22-20	Discuss research plan and team status update	<ul style="list-style-type: none"> <li>▪ <b>Meet in 347 Fisher</b></li> <li>▪ <b>Submit final secondary research report</b></li> <li>▪ <b>Submit primary research plan</b></li> <li>▪ <b>Meeting minutes due NOON, Friday</b></li> <li>▪ Refer to Carmen assignment for detail</li> <li>▪ Review Knowledge Gaps from secondary research &amp; Primary Research Plan – quantitative surveys + qualitative interviews</li> <li>▪ Utilize <i>Primary Research Tips and References</i> in Carmen</li> <li>▪ Begin published research (articles/research studies, etc. by industry experts) (To be used to support and validate strategy and tactics)</li> <li>▪ Be prepared to lead the conversation through the team status</li> </ul>
WK 4: 1-29-20	Discuss research activities update	<ul style="list-style-type: none"> <li>▪ <b>Meet in 347 Fisher</b></li> <li>▪ <b>Submit research activities update (refer to Carmen assignment)</b></li> <li>▪ <b>Meeting minutes due NOON, Friday</b></li> <li>▪ Refer to Carmen assignment for detail</li> <li>▪ Teams present status of research activities</li> </ul>
WK 5: 2-5-20	Discuss research activities update	<ul style="list-style-type: none"> <li>▪ <b>Meet in 347 Fisher</b></li> <li>▪ <b>Submit research activities update (refer to Carmen assignment)</b></li> <li>▪ <b>Survey questions need to be written and Qualtrics survey created</b></li> <li>▪ <b>Meeting minutes due NOON, Friday</b></li> <li>▪ Refer to Carmen assignment for detail</li> <li>▪ Teams present status of research activities &amp; initial findings</li> </ul>
WK 6: 2-12-20	Finalize Qualtrics survey questions and begin administering survey no later 2-14-20	<ul style="list-style-type: none"> <li>▪ <b>Meet in 347 Fisher</b></li> <li>▪ <b>Submit draft of initial insights summary</b></li> <li>▪ <b>Meeting minutes due NOON, Friday</b></li> <li>▪ Refer to Carmen assignment for detail</li> <li>▪ Be prepared to lead the conversation through the team status</li> </ul>
WK 7: 2-19-20	Discuss key insights and initial survey results	<ul style="list-style-type: none"> <li>▪ <b>Meet in 347 Fisher</b></li> <li>▪ <b>Submit updated key insights and survey results</b></li> <li>▪ <b>Meeting minutes due NOON, Friday</b></li> <li>▪ Refer to Carmen assignment for detail</li> <li>▪ Be prepared to lead the conversation through the team status</li> <li>▪ <b><u>Mid-term peer review due</u></b></li> </ul>
WK8: 2-26-20	Discuss final key insights and begin strategic framework	<ul style="list-style-type: none"> <li>▪ <b>Meet in 347 Fisher</b></li> <li>▪ <b>Submit insight summary and draft of Strategic Framework Template</b></li> <li>▪ <b>Meeting minutes due NOON, Friday</b></li> <li>▪ Refer to Carmen assignment for detail</li> <li>▪ Be prepared to lead the conversation through the team status</li> </ul>
WK 9: 3-4-20	<b>Status Update with Client</b>	<ul style="list-style-type: none"> <li>▪ <b>Meet in Mason Hall 141 at normal small group meeting time.</b></li> <li>▪ <b>MANDATORY ATTENDANCE</b></li> <li>▪ Refer to Carmen assignment for detail</li> <li>▪ Individual teams meet for 25 minutes with client</li> <li>▪ Client attends status meeting</li> <li>▪ Teams to review/discuss research findings (insights) and <u>high-level</u> strategic framework</li> <li>▪ <b>Submit updated draft of Strategic Framework</b></li> </ul>
WK 10: 3-11-20	<b>NO MEETINGS – SPRING BREAK – Continue administration of Qualtrics survey</b>	
WK 11: 3-18-20	Strategic Framework	<ul style="list-style-type: none"> <li>▪ <b>Meet in 347 Fisher</b></li> <li>▪ <b>Submit insight summary and draft of Strategic Framework Template – include start of validation plan</b></li> <li>▪ <b>Meeting minutes due NOON, Friday</b></li> <li>▪ Refer to Carmen assignment for detail</li> <li>▪ Be prepared to lead the conversation through the team status</li> </ul>

WK 12: 3-25-20	Strategic framework, campaign messaging, tactical support plan, and validation plan	<ul style="list-style-type: none"> <li>▪ <b>Meet in 347 Fisher</b></li> <li>▪ <b>Submit updated draft of Strategic Framework with campaign, tactical details, and validation plan</b></li> <li>▪ <b>Begin designing slide deck layout</b></li> <li>▪ <b>Meeting minutes due NOON, Friday</b></li> <li>▪ <b>Refer to Carmen assignment for detail</b></li> <li>▪ All materials due from this point on may be submitted via slide deck</li> <li>▪ Put placeholders on slides for artwork, graphics, unavailable information</li> <li>▪ Be prepared to lead the conversation through the team status</li> </ul>
WK 13: 4-1-20	Presentation Draft	<ul style="list-style-type: none"> <li>▪ <b>Meet in 347 Fisher</b></li> <li>▪ <b>Submit Final Strategic Framework via draft slide deck</b></li> <li>▪ <b>Refer to Carmen assignment for detail</b></li> <li>▪ Review draft of presentation (slide deck) with instructor</li> <li>▪ Be prepared to lead the conversation through the team status</li> </ul>
WK 14: 4-7, 8, 9-20	<b>Dress Rehearsal</b>	<ul style="list-style-type: none"> <li>▪ <b>Dress Rehearsal – MANDATORY ATTENDANCE</b></li> <li>▪ <i>Check assignment for location/day/time</i></li> <li>▪ <i>One-hour time slots throughout the day for each team</i></li> <li>▪ <i>Each team schedules one hour to include timed dress rehearsal followed by instructor-led discussion</i></li> <li>▪ <i>Team signup for dress rehearsal to take place during second class meeting</i></li> </ul>
WK 15: 4-13-20	Final deliverable file due via Carmen	<ul style="list-style-type: none"> <li>▪ <b>FINAL copy of deliverable and slide deck due via Carmen</b></li> <li>▪ <b>Refer to Carmen assignment</b></li> </ul>
WK 15: 4-15-20	<b>Final Presentations to Client</b>	<ul style="list-style-type: none"> <li>▪ <b>Meet in 305 Schoenbaum Hall, 4:10pm to 7:10pm</b></li> <li>▪ Presentation order will be drawn at the beginning of class; all teams are to be present during the entire class</li> <li>▪ <b>Refer to assignment for all details.</b></li> </ul>