

# BUSML 4204: MARKETING PROJECTS - 29942

Autumn 2018

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**Professor:** Andrew Piletz  
**Classroom:** Schoenbaum Hall 200  
**Email:** piletz.3@osu.edu

**Class Time:** Wednesdays, 8:00am – 11:00 am  
**Office Hours:** By appointment

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## Course Overview

Project-Based Marketing Consulting (BUSML 4204: Marketing Projects) is an action-based learning experience as well as a competition.

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

1. Research insights, findings and other analyses to support your recommendations.
2. A comprehensive marketing implementation plan for a client organization.
3. A fully developed set of sample tactical elements that will be utilized within the plan (e.g., a set of print and/or broadcast advertisements; sample pages from a website; sample sales promotions, sample experiential tactics, etc.).
4. A final presentation to your client, communicating in a compelling fashion your insights, strategy, and recommended plan of action.

*This course represents a capstone experience in your education as a marketing major at the Fisher College 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. Teams will also compete with one another, and winning teams will be announced based on team performance in this marketing consulting project.*

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.

Effective marketing consultants are able to accomplish key tasks:

- Quickly grasp the current business situation.
- Identify and leverage appropriate marketing knowledge and techniques.

- Provide a level of objectivity not achievable within the company.
- Create an appropriate research plan and analyze all relevant data.
- Make strategic and tactical recommendations.
- Create an appropriate implementation plan.
- Communicate findings and recommended actions effectively and persuasively.

As a marketing major in the Fisher College of Business, you have taken several marketing courses tied to various elements of the marketing process. In this Project-Based Marketing Consulting course you will integrate this knowledge base and develop new skills in your role as a member of a marketing consulting team.

Like most disciplines, there are few hard and fast "rules" and "established procedures" in marketing. This will become especially obvious in this course. With rapid developments in technology, "big data" and the diffusion of new platforms such as social and mobile media, the field is undergoing crucial and game-changing transformations. In addition, in many markets, strategic agility has become paramount in the face of such disruptive change. Marketers must be able to lead this charge, using creativity and informed intuition based on solid training and expertise. In this course you will move beyond looking for "the right answer" to instead embrace a strategic approach to marketing problem-solving. The real-world "live" project is an opportunity to accomplish exactly this.

### **Course 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.

### **Course Materials**

**There is no textbook or course packet required for this course.** Class materials (including the project brief and other client-provided resources) will be posted on Carmen, as and when necessary. Groups will be required to provide printed deliverables to the clients at the end of the semester.

### **Class Format**

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.

## Grade Structure

The following grade structure will be utilized for this course:

<u>Graded Component</u>	<u>% of the Final Grade</u>
1. Final Implementation Plan & Support Materials*	40%*
2. Final Presentation Effectiveness*	20%*
3. Peer Evaluation*	20%*
4. On-course Project Progress (weekly status meetings)	20%

**\*Individuals who receive less than 75% Peer Evaluation (as an average of all teammates evaluations) will receive only 80% credit of the Group Project and Presentation grades.**

## Grading Scale

The grading scale that will be utilized for the final grade are as follows:

A =	93 – 100%	C+ =	77 – 79.99%
A- =	90 – 92.99%	C =	73 – 76.99%
B+ =	87 – 89.99%	C - =	70 – 72.99%
B =	83 – 86.99%	D+ =	67 – 69.99%
B- =	80 – 82.99%	D =	63 – 66.99%

### Final Marketing Plan & Supporting Materials: 40% 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.

### Final Presentation Ability: 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 75% Peer Evaluation (as an average of all evaluations) will receive only 80% credit of the Group Project grade.**

It is important that Peer Evaluation scores are determined based on objective criteria rather than personal opinion. It is normal for group members to have different approaches, personalities, and opinions so your group will need a clear framework for how you will work together and the expectations of performance. One of the first tasks your group 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 session.

**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.

### **On-course Project Progress: 20% of the Final Grade**

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 required consistent work at a high level of competence and efficiency. Pulling it all together at the very last minute doesn't 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.

This graded component is a combination of a group and individual contribution. The starting point of the grade will be whether the group as a whole completes the assigned deliverables, but it will also take into account participation in our weekly meetings. While it is normal for certain team members to be more vocal, it is expected that all team members contribute to our discussions. Low participation in the weekly status meetings will affect this portion of the grade on an individual level.

### **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.

The first deliverable as a team will be to develop your **Team Charter** which will be sent to the instructor one week after the team formation. A template will be shared during the first session and will be posted on Carmen.

## Attendance Policy, Professionalism and Etiquette

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 -

1. **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. If you anticipate being absent for this class session, please talk to your undergraduate advisor to enroll in another course.**
2. Much of this course will be 25-minute weekly meetings with the instructor to review progress and action plan. Each group member is expected to attend these meetings at your allotted time. Given these meetings will be back-to-back between groups, it is crucial to **begin and end on time**. The entire group must be outside of our classroom at least 5 minutes before your starting time. The instructor will notify your group when to come in.
3. For each of the class sessions (see the course timeline on next page), **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.
4. **Food and drink consumption.** Please minimize the consumption of food or drinks (except water) during class.
5. **Use of Technology during status meetings.** These meetings are meant for your group'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.
6. **Please be professional and courteous in your communication with the client**, with other team members and classmates, and with the instructor.

## Academic Integrity

Academic integrity is essential to maintaining an environment that fosters excellence in learning, teaching, research, and other educational and scholarly activities at Fisher College of Business and The Ohio State University. Thus, The Ohio State University and the Committee on Academic Misconduct (COAM) expect that all students have read and understand the University's *Code of Student Conduct*, and that all students will complete all academic and scholarly assignments with fairness and honesty. Students must recognize that failure to follow the rules and guidelines established in the University's *Code of Student Conduct* and this syllabus may constitute "Academic Misconduct."

## Course Timeline & Activities

**Shaded weeks are when we will all meet together as an entire class at 8:00am.**

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

Date	Discussion Topics	Details & <i>Deliverables</i> (due in Carmen before meetings)
WK 1: 8/22/18	Course Introduction, Team Formation, & Client Briefing	<ul style="list-style-type: none"> <li>Students will form their own teams</li> <li>Client will join us during second half of class to present project overview</li> </ul>
WK 2: 8/29/18	Secondary Research	<ul style="list-style-type: none"> <li><b>Submit DRAFT of Secondary Research Report</b></li> <li>Review secondary research analysis</li> <li>Utilize <i>5C Analysis Input</i> document in Carmen</li> </ul>
<b>FINAL Secondary Research Report Due – Submitted in Carmen by EOD Tuesday, 9/4</b>		
WK 3: 9/5/18	<i>NO CLASS: ENJOY A LONG LABOR DAY!</i>	
WK 4: 9/12/18	Discuss Primary Research Plan	<ul style="list-style-type: none"> <li><b>Submit Primary Research Plan</b></li> <li>Review Knowledge Gaps from secondary research &amp; Primary Research Plan – quantitative surveys + qualitative interviews</li> <li>Utilize <i>Market Research Guide</i> in Carmen</li> </ul>
WK 5: 9/19/18	Research Update	<ul style="list-style-type: none"> <li><b>Submit Research Update</b></li> <li>Groups present status of research activities</li> </ul>
WK 6: 9/26/18	Research Update	<ul style="list-style-type: none"> <li><b>Submit Research Update</b></li> <li>Groups present status of research activities &amp; initial findings</li> </ul>
WK 7: 10/3/18	Key Insights Review	<ul style="list-style-type: none"> <li><b>Submit draft of Insights Summary</b></li> <li>Be prepared to lead the conversation through the document</li> </ul>
WK 8: 10/10/18	Strategy & Plan Development Overview	<ul style="list-style-type: none"> <li><b>Submit Mid-Point Peer Evaluation</b></li> <li><b>All groups meet together in class at 2:30pm</b></li> <li>Professor will share tools for strategy and marketing plan development as well as examples from past semesters</li> </ul>
WK 9: 10/17/18	Strategic Framework Development & Review	<ul style="list-style-type: none"> <li><b>Submit Draft Insight Summary / Strategic Framework Template</b></li> <li>Be prepared to lead the conversation through the document</li> </ul>

WK 10: 10/24/18	<i>Status Update with Client</i>	<ul style="list-style-type: none"> <li>▪ <b>Submit updated draft of Strategic Framework Template (see details in Carmen Assignment)</b></li> <li>▪ Client present at status meeting to review/discuss research findings (insights) and <u>high-level</u> strategic framework</li> </ul>
WK 11: 10/31/18	Revised Strategic Framework & Validation Plan	<ul style="list-style-type: none"> <li>▪ <b>Submit updated draft of Strategic Framework Template with Validation Plan added</b></li> <li>▪ Review updated Strategic Framework and plans to validate tactical program</li> </ul>
WK 12: 11/7/18	Tactical Validation Activities	<ul style="list-style-type: none"> <li>▪ <b>Submit updated draft of Strategic Framework Template &amp; Validation Plan with update</b></li> <li>▪ Review validation findings</li> </ul>
WK 13: 11/14/18	Presentation Draft Review	<ul style="list-style-type: none"> <li>▪ <b>Submit Draft of Presentation</b></li> <li>▪ Review draft of presentation with instructor</li> </ul>
WK 14: 11/21/18	<ul style="list-style-type: none"> <li>▪ <b>NO CLASS: ENJOY YOUR THANKSGIVING!</b></li> </ul>	
WK 15: 11/28/18	Practice Presentations	<ul style="list-style-type: none"> <li>▪ <b>Submit updated Draft of Presentation with Program Evaluation Metrics in Appendix</b></li> <li>▪ Review draft of presentation with instructor</li> </ul>
<i>Practice presentations with instructor (teams to sign up for time slots)</i>		
WK 16: 12/5/18	Final Presentations to Client	<ul style="list-style-type: none"> <li>▪ Presentations will be in numerical order of groups; all groups will be there during entire class</li> <li>▪ <b>Bring multiple color copies of Implementation Plan (Presentation Slides + Appendix) for Client (final number TBD)</b></li> <li>▪ <b>Submit Peer Evaluation</b></li> </ul>

## **Professor Bio**

**Andrew Piletz**  
**Adjunct Professor**  
**Department of Marketing & Logistics**  
**Fisher College of Business**

Andrew Piletz has been working for nearly a decade in brand management in the consumer products and healthcare industries. Andrew has always had a passion for coaching, mentoring, and teaching and enjoys bringing real world experience into the classroom.

After earning his MBA, Andrew joined Abbott Nutrition as an Associate Brand Manager on the Glucerna brand team. From there, Andrew rapidly moved through the organization working on brands such as Ensure and Glucerna and was most recently the Senior Brand Manager of Ensure and Glucerna Direct Marketing. Responsibilities at Abbott Nutrition included brand strategy and positioning, channel planning, P&L management, new product launches, innovation, and more.

In 2018 Andrew transitioned from Abbott Nutrition to lead the marketing efforts of Wallick Communities as the Director of Marketing for Senior Living Communities. Current responsibilities include marketing strategy, positioning, lead generation, and long-term business planning.

Personally, Andrew is passionate about his faith and his family. He spends much of his free time with his wife trying to keep up with their three young children.

Andrew earned his MBA from The George Washington University and his B.A. in International Studies from The University of Mississippi.

