



BUSML 4204: MARKETING PROJECTS Spring 2016

Project-Based Marketing Consulting

Professor:	Scott LaCross	Class Time:	Fridays, 8:00am – 11:00am
Office:	050 Fisher Hall	Classroom:	Gerlach Hall 305
Email:	lacross.2@osu.edu	Office Hours:	By appointment

I. 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 six students** on a real-world, “live” project. Your task is to develop and provide 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 (e.g., a set of print and/or broadcast advertisements; sample pages from a website; sample sales promotions, sample experiential tactics, etc.).
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.

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.

- **A Marketing Consulting Team**

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 and tap this knowledge base and develop new skills in your role as a member of a marketing consulting team.

- **Your Approach 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.

II. 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.

III. Course Materials

There is no textbook or course packet required for this course.

Class materials (including the client brief) will be posted on Carmen, as and when necessary.

There are various free resources and videos available at www.StartMarketingRight.com that align with the process used in this classroom. Students are encouraged to reference those materials to supplement our live weekly meetings.

IV. Class Format

We will meet as a class for only **three** designated class sessions (**see the course flowchart and timeline on page 6 of this syllabus**). Teams will meet with the course instructor at regular intervals during an assigned meeting time.

V. Grade Structure

The following grade structure will be utilized for this course:

<u>Graded Component</u>	<u>% of the Final Grade</u>
1. Implementation Plan, Report & Supporting Materials*	40%*
2. Final Presentation to Client*	30%*
3. Peer Evaluation*	20%*
4. On-course Project Progress (weekly status meetings)	10%
	<hr/>
	Total 100%

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

VI. Grading Scale

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

	GPE		GPE
A =	93 - 100% 4.0	C+ =	77 - 79.99% 2.3
A- =	90 - 92.99% 3.7	C =	73 - 76.99% 2.0
B+ =	87 - 89.99% 3.3	C- =	70 - 72.99% 1.7
B =	83 - 86.99% 3.0	D+ =	67 - 69.99% 1.3
B- =	80 - 82.99% 2.7	D =	63 - 66.99% 1.0

A: Exemplary Performance; A-: Strong Performance; B+: Good Performance; B: Adequate Performance; B-: Adequate Performance, with Some Deficiencies; C+: Weak Performance, with Serious Deficiencies; C: Poor Performance, with Pervasive Deficiencies

(Note: Performance below the "C" level will be addressed on a case-by-case basis.)

VII. Explanation of Graded Components

(additional details and examples will be provided throughout the semester)

- **Implementation Plan, Report & Supporting Materials: 40% of the Final Grade**

The implementation plan that you develop based on your research, analysis, strategy development, and recommendations should **follow the outline shown on page 7 of this syllabus**. This document will be printed and provided to the client for them to keep.

- **Final Presentation: 30% of the Final Grade**

Teams will make their final presentation to the client and the instructor. In this presentation, each team should communicate the main selling points of your plan to your client (and/or other relevant stakeholders) and the strength of your recommendations. Your team's presentation will be evaluated on dimensions including clarity, persuasiveness and professionalism. **The presentation grading criteria are included on page 8 of this syllabus.**

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

Team collaboration and participation is a crucial element of this class and will affect the quality of final deliverables. Each team member will provide a performance evaluation of the other members, **using the framework shown on page 9 of this syllabus**. 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.

- **On-course Project Progress: 10% 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-course your team's performance was, on the project.

VIII. Team Formation

You will have an opportunity to form your own team of **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. Please designate one student for your team, by the end of the first class session, to be the main point of contact with the instructor and the client.

The first deliverable as a team will be to develop a **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.

IX. 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 (Friday, January 15th) will be dropped from the class. There is no exception to this policy. If you anticipate being absent for this class sessions, please talk to your undergraduate advisor to enroll in another course altogether, as you will be dropped from this class.
2. For each of the class sessions (see the course flowchart and timeline on page 6 of this syllabus document for dates), **please 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.
3. 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. Each team will send an agenda to the professor prior to class and indicate any group members who are expected to be absent (which should not occur consistently). Given these meetings will be back-to-back between groups, it is crucial to **begin and end on time.**
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.
6. **Please be professional and courteous in your communication with the client,** with other team members and classmates, and with the instructor (see page 9 of this syllabus document for guidelines).

X. 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." Other sources of information on academic misconduct (integrity) to which you can refer include:



FISHER
COLLEGE OF BUSINESS

The Committee on Academic Misconduct <http://oaa.osu.edu/coam.html>
Preserving Academic Integrity <http://oaa.osu.edu/coam/ten-suggestions.html>

XI. Course Flowchart & Approximate Timeline

Timing	Activity & Milestones	Details
Week 1 1/15/16	Course Introduction, Team Formation, & Client Briefing	<ul style="list-style-type: none"> Course overview and review of syllabus Team formation Meet your client—client gives project brief with relevant background and current situation assessment Client shares project assignment and criteria
Weeks 2 – 6	Primary & Secondary Research	<ul style="list-style-type: none"> Create and implement research plan. Gather competitive intelligence, integrate secondary and primary research; analyze results; derive implications.
Week 7 2/26/16	Class Session: Strategy & Plan Development Overview	<ul style="list-style-type: none"> All groups meet together in class Professor will share tools for strategy and marketing plan development Professor will showcase examples from past semesters
Weeks 8 – 10	Strategy & Implementation Plan Formulation	<ul style="list-style-type: none"> Formulate strategy and tactics for the project. Apply frameworks and tools learned in various marketing courses and those provided by professor
Weeks 11 - 12	Develop Project Materials	<ul style="list-style-type: none"> Create and develop materials for the project. Depending on the nature of your project, these materials may include videos, ads, website designs, branding signage, and other marketing materials.
Weeks 13 – 14	Testing & Execution, Measurement Plan, & Presentation Prep	<ul style="list-style-type: none"> Test the materials developed (where possible) Measure impact and make revisions if necessary. Assemble the final Implementation Plan and Presentation, including all appendices and supporting materials.
Week 15 4/22/14	Final Presentations & Implementation Plan to Client	<ul style="list-style-type: none"> Formal presentation to client and instructor. Client, course instructor and others are present to evaluate presentation and implementation plan. Multiple color copies of Implementation Plan – one to Course Instructor plus others for Client (final number TBD).

Shaded weeks are when we will meet together as an entire class.

XII. Outline for Implementation Plan and Report

1. Executive Summary – 5% of grade

High-level summary of entire document (target 1 page)

2. Situation Analysis – 15% of grade

Set up the situation and the context for this project. Describe where the brand is today, its challenges

- A. Relevant Historic & Current Context (company history, key milestones / significant events, etc)
- B. Industry/Market Analysis (financial performance, future projections, market dynamics, etc.)
- C. Category & Competitor Analysis (could use Porter's 5 Forces, SWOT, etc)

3. Objectives – 10% of grade

What do we need to achieve and measure to be successful? These are the higher-level metrics for overall business performance (not specific tactics...that is program evaluation below).

- A. Quantitative Benchmarks – the marketing metric we are trying to change
- B. Measurement Methods – how will you measure this?
- C. Criteria for Success – what does success look like? What is your target?
- D. Time Frame – how quickly do you believe you can move the needle? Is there a short-term/long-term component?

5. Research Methodology & Key Insights – 15%

Describe in detail about your research (both quantitative & qualitative) and explain your key insights and provide support from your research

6. Recommended Strategy – 20% of grade

Communicates where the client should focus their resources and time

- A. Clear and concise articulation of how the plan will achieve its objectives

7. Tactical Execution – 20% of grade

Brings the strategy to life with specific programs that reach target audience(s)

- A. Clear and concise articulation of tactics (what, when, where and how)
- B. Sample tactical elements – any "show & tell" mock-ups
- C. Estimated budget by tactical component (dollars, % of total, etc.)

8. Program Evaluation – 10% of grade

Describe the success metrics for the individual tactical programs. How will you measure and what changes would you make if things are not going as planned?

- A. Success criteria
- B. Methods of measurement
- C. Consequences and Contingencies

9. Appendices – 5% of grade

- A. Bibliography – any referenced sources, materials
- B. Detailed Research Results
- C. Other Supporting Materials

XIII. Group Presentation Evaluation Criteria

Team: _____

Evaluator: _____

1.	Understanding of the Project and Problem Summary	out of 5
2.	Research: Primary and Secondary	out of 10
3.	Ability to Identify and Articulate Key Insights	out of 10
4.	Overall Strategy: Ideas, Framework	out of 15
5.	Execution – Strategy Execution and Tactics	out of 15
6.	Feasibility of Recommendations, Overall Brand Fit	out of 10
7.	Presentation: Content and Style	out of 10
8.	Presentation: Persuasion and Selling Ability	out of 10
GRAND TOTAL		out of 85

Strengths:

Weaknesses:

Suggestions:

XIV. Peer Evaluation Report Template (separate document available on Carmen)

Your Team Number:

Your Name:

Please write in the name of each member in your group below ([including yourself](#)). Then assign points (out of a maximum of 10) for each person ([including yourself](#)), reflecting their true contribution to your project. This is an important feedback and learning mechanism, so be objective in your assessment.

You can assign points between 0 – 100% and can use multiples of 5% (i.e. 95%, 90%, 85%, etc).

Scores should be determined in relation to how well the team members fulfilled the commitments included in the Team Charter. Think of both the number of commitments they met and the consistency throughout the course. Use the below descriptions for guidance in determining scores and provide comments at the bottom.

100% = Went above & beyond commitments and contribution (this is uncommon and cannot be given to more than two people if at all)

90% or 95% = Met every commitment and strongly contributed

80% or 85% = Met most commitments and mostly contributed

75% = Inconsistent with commitments and moderate contribution

70% or less = Rarely present or barely contributed (if average group score is under 75%, the individual will only receive 80% of group grade for projects)

Group Members (include yourself)	Individual Scoring (as a %)

Comments about your group members to support scoring ([REQUIRED](#)):

XV. Guidelines for Client / Team Interactions and Overall Professionalism

To help set expectations about interaction between clients and students, here are some guidelines:

- This is a competition as well as an action-based educational experience for the students. Information or insight from the client will be provided based on each team's requests (and availability on the part of the client). Each team is responsible for gathering what they deem is necessary or relevant. There is no requirement that what is provided to, or shared with, one team must be given to the other.
- Every attempt should be made to avoid cross-talk or sharing about what one or another team is doing. Unless otherwise specified by the course instructor, there should be an 'impermeable wall' among teams from the client's perspective and from each team's perspective.
- Clients are busy, working people. Each client should identify a primary contact person within their organization, who should be the 'go-to' person when teams have questions or need direction. Teams' interaction with the client should be limited if possible, and only on an as-needed basis.
- Each member of each team must sign a non-disclosure agreement with their client (if required).
- The course instructor is available as a resource to clients as well as teams during this process. If clients or teams have questions or concerns, please contact the instructor immediately.
- Teams are acting as consultants, but clients should reserve judgment on team actions or performance until the end of the semester, when each team will make a presentation and turn in their Implementation Plan as well as supporting materials. Clients must arrange to be present for their teams' presentations; and students must attend ALL presentations, not just their own.



XVI. Professor Bio

Scott LaCross
Adjunct Professor of Marketing
Fisher College of Business

Scott LaCross is the owner of The Speiro Group, a Columbus, Ohio-based consulting firm serving companies in the areas of strategic planning, marketing execution, and leadership development. He is also the founder of StartMarketingRight.com, an online resource that helps companies plan and execute effective marketing programs. Scott has extensive marketing and brand management experience across business-to-business services, consumer products, and healthcare industries.

Prior to starting The Speiro Group and StartMarketingRight.com, Scott held various brand marketing positions with Sara Lee Corporation (now Hillshire Brands) and Abbott Nutrition. His experience includes strategic business planning, P&L management, profitability improvement, cross-functional team management, market research design, brand identity and positioning, advertising and promotions development, and new product launches.

Scott earned his MBA from Northern Illinois University and his B.S. in Marketing and Organizational Leadership from Miami University.