Harvard Extension School  
MGMT E-6000 Marketing Management  

Fall Term 2015 - CRN 14792 - Section 3  
Thursdays, 7:40-9:40pm  
On Campus - Emerson Hall 108  

Instructor: Areen Shahbari  
Email: AreenShahbari@fas.harvard.edu  

COURSE DESCRIPTION

In this comprehensive and practical introduction to marketing management, you will improve your ability to make effective marketing decisions, including assessing marketing opportunities and developing marketing strategies and implementation plans. Course topics include market-oriented strategic planning, marketing research and information systems, buyer behavior, target market selection, competitive positioning, product and service planning and management, pricing, distribution, and integrated communications, including advertising, public relations, Internet marketing, social media, and sales promotions. Through a combination of interactive discussions, cases, practical examples, individual assignments, and a group project, the course applies marketing topics to consumer and business-to-business products, services, and nonprofit organizations. Students gain significant experience in communicating and defending their marketing recommendations and building on the ideas of others.

COURSE OBJECTIVES

Upon completion of this course, you will be able to:

- Gain solid understanding of key marketing concepts and skills
- Perform situation analysis to assess market opportunities
- Gather, analyze, and draw conclusions from market and environmental data
- Develop marketing strategies (Segmentation, targeting, and positioning ) to achieve company's objectives.
- Use the 4 P’s frame (Product, Place, Price, and Promotion) to help define the marketing elements needed for a successful product offering.
- Build an effective marketing plan to promote a company's product and/or service.
- Make strategic recommendations and persuasively communicate your recommendations and rationale

COURSE MATERIALS

COURSE FORMAT

Class sessions will be mixed in format, to include interactive lectures, discussions of readings, case analyses, video clips, and in-class exercises and presentations. In addition, you will be divided into teams and each team will be asked to build a marketing plan to promote a company's product and/or service. Much of the learning in this course will occur both in class as you share your experiences, questions, and analyses with each other, and out of class as you work with your classmates throughout the semester to create a strategic marketing plan.

RESPONSIBILITY for LEARNING

The instructor is responsible for facilitating learning and, when necessary, clarifying difficult to understand areas. However, the responsibility for learning falls on you. At times the course may become difficult for you; it is your responsibility to tell the instructor when it does so that help may be given. But, you should also know that aid is more apt to be in the form of direction rather than the providing of solutions.

CLASS PROTOCOL

In order to sustain a focused and high-quality learning atmosphere during class:

- Cell phones must be turned off or silenced unless the professor asks for their usage.
- Photography and videography are prohibited.
- Computers may be used for note taking and referring to prepared class materials.
- Using the Internet is strictly prohibited unless the instructor calls for its use.
- When someone is speaking, it is discourteous to the class and the speaker if others are engaged in activity other than active listening (e.g. chatting, reading email). You should avoid speaking with classmates when someone is speaking. If what you have to say cannot be shared with the class you should wait until after class to say it.

If you violate this protocol, you will be given no mark for class participation on that day.

CLASS PREPARATION and PARTICIPATION

Your own contribution to the classroom discussion based on your own knowledge and your experiences is a critical part of the success of the course for everyone. I expect relevant, informed, interesting, and insightful comments from individuals in the class. This includes during full class discussion as well as during team breakout sessions. In all situations, be absolutely clear that quality of contribution rather than merely quantity of "talk time" is a key to your success. Be respectful of other students and avoid exhibiting dominating one-way approaches to class discussion. It is your responsibility to attend class. Attendance directly factors into this category since, obviously, you cannot participate if you are not in class. Much of the learning in this course comes from our in-class interactions and activities. In this course there is no viable way to “make up” missed in-class learning opportunities. If you absolutely cannot attend class, please e-mail me in advance.

Class participation is measured based on the following criteria:

- Arriving to class on time and staying through the end of class
- Being fully engaged in your learning by listening attentively in class and by providing strong evidence to support your argument
- Advancing the discussion by contributing insightful comments and questions
- Demonstrating interest in your peers’ comments, questions, presentations and providing constructive feedback when asked to.

Please prepare a large nametag with your first name printed in large letters and display it in EVERY class to ensure you receive appropriate credit for your class participation.
**EVALUATION/GRADING**

<table>
<thead>
<tr>
<th>percent of grade</th>
<th>percentage of grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class Contribution</td>
<td>30%</td>
</tr>
<tr>
<td>Case Analysis</td>
<td>25%</td>
</tr>
<tr>
<td>Marketing Plan / Group Presentation</td>
<td>10%</td>
</tr>
<tr>
<td>Marketing Plan / Group Final Paper</td>
<td>25%</td>
</tr>
<tr>
<td>Key Learnings and Reflection / Group Presentation</td>
<td>10%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>100%</td>
</tr>
</tbody>
</table>

**GRADE SCALE**

<table>
<thead>
<tr>
<th>Grade</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>93-100</td>
</tr>
<tr>
<td>A-</td>
<td>90-92</td>
</tr>
<tr>
<td>B+</td>
<td>87-89</td>
</tr>
<tr>
<td>B</td>
<td>83-86</td>
</tr>
<tr>
<td>C</td>
<td>73-76</td>
</tr>
<tr>
<td>C+</td>
<td>77-79</td>
</tr>
<tr>
<td>D</td>
<td>63-66</td>
</tr>
<tr>
<td>D+</td>
<td>67-69</td>
</tr>
<tr>
<td>E</td>
<td>below 60</td>
</tr>
</tbody>
</table>

**LETTER GRADES**

Grades reflect the quality and quantity of a student's work submitted throughout the term.

- **A and A-:** Earned by work whose superior quality indicates a full mastery of the subject and extraordinary distinction. “A” students have punctual attendance, they are thoroughly prepared for class, ready to share their insights and provide qualitative and quantitative data to support their arguments, exhibit interest in the class and in the subject, show initiative and drive, monitor their performance and are proactive in making necessary adjustments.
- **B+, B, and B-:** Earned by work that indicates a strong comprehension of the course material, a good command of the skills needed to work with the course materials, and the student’s full engagement with the course requirements and activities.
- **C+, C, and C-:** Earned by work that indicates an adequate and satisfactory comprehension of the course material and the skills needed to work with the course materials, and that indicates that the student has met the basic requirements for completing assigned work and participating in class activities.
- **D+, D, and D-:** Earned by work that is unsatisfactory but that indicates some minimal command of the course materials and some minimal participation in class activities that is worthy of course credit.
- **E:** Earned by work that is unsatisfactory and unworthy of course credit. This grade may also be assigned to students who do not submit required work in courses from which they have not officially withdrawn by the withdrawal deadline. Zero or E grades are assigned to students for missing work. These grades are included in the calculation of the final grade.

**Disability services**

The Extension School is committed to providing an accessible academic community. The Disability Services Office offers a variety of accommodations and services to students with documented disabilities. For more information, please visit [www.extension.harvard.edu/resources-policies/resources/disability-services-accessibility](http://www.extension.harvard.edu/resources-policies/resources/disability-services-accessibility)

**PLAGIARISM**

You are responsible for understanding Harvard Extension School policies on academic integrity [http://www.extension.harvard.edu/resources-policies/student-conduct/academic-integrity](http://www.extension.harvard.edu/resources-policies/student-conduct/academic-integrity) and how to use sources responsibly. Not knowing the rules, misunderstanding the rules, running out of time, submitting “the wrong draft”, or being overwhelmed with multiple demands are not acceptable excuses. There are no excuses for failure to uphold academic integrity. To avoid Plagiarism, please visit [www.extension.harvard.edu/resources-policies/resources/tips-avoid-plagiarism](http://www.extension.harvard.edu/resources-policies/resources/tips-avoid-plagiarism). You will find links to the Harvard Guide to Using Sources and two, free, online 15-minute tutorials to test your knowledge of academic citation policy. The tutorials are anonymous open-learning tools.
### COURSE OUTLINE

<table>
<thead>
<tr>
<th>Week</th>
<th>Topic</th>
<th>Read/Watch</th>
<th>Deliver</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Part 1: Discover Marketing Management</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| 1. 9/3 | Introduction: Course, Concepts and Colleagues  
**Overview**  
What is marketing? | Ch. 1 | Read Assigned Chapter |
| **SITUATION ANALYSIS**  
- Macro-level External Environment  
- Competitive Environment  
- Internal Environment  
- SWOT Analysis | Ch. 2  
Ch. 2 Case  
Appendix: Abbreviated Example Marketing Plan | Read Assigned Chapter and Prepare for Case Discussion |
| **Part 2: Use Information to Drive Marketing Decisions** |
| 3. 9/17 | CONSUMER BEHAVIOR RESEARCH  
Marketing Research  
- Primary Research: 5 In Depth Interviews, 1 Focus Group, 2 Observations, and a Survey answered by 30+ people)  
- Secondary Research  
- Netnography Research | Ch. 3  
Ch. 3 Case | Read Assigned Chapter and Prepare for Case Discussion  
Due: Submit and present product/service for approval |
| 4. 9/24 | Buying Behavior  
- Consumer Behavior  
- Industrial Buyer Behavior | Ch. 4  
Ch. 4 Case | Read Assigned Chapter and Prepare for Case Discussion  
Due: Situation Analysis Presentation (part of class contribution grade) |
| **MARKETING STRATEGIES**  
- Segmentation strategy (four categories of segmentation: geographic, demographic, psychographic, and behavioral)  
- Target Market Selection/Target Marketing  
- Positioning strategy: features of effective positioning, able to draft a positioning statement  
- CRM | Ch. 6  
Ch. 6 Case | Read Assigned Chapter and Prepare for Case Discussion |
| **Part 3: Develop the Value Offering - The Product Experience** |
| 6. 10/8 | MARKETING MIX / The 4 P’s:  
1. Product  
- Product life cycle  
- Developing new products/services | Ch. 7  
Ch. 7 Case | Read Assigned Chapter and Prepare for Case Discussion  
Due: Consumer Behavior Research and Marketing Strategies Presentation (part of class contribution grade) |
| 7. 10/15 | 1. Product/Brand Management  
- Brand equity  
- Branding decisions | Ch. 8  
Ch. 8 Case | Read Assigned Chapters and Prepare to Present Your Company’s Situation Analysis |
### Part 4: Price and Deliver the Value Offering

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Assigned Chapters</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>9. 10/29</td>
<td>2. Pricing</td>
<td>Ch. 10</td>
<td>Read Assigned Chapter and Prepare for Case Discussion</td>
</tr>
<tr>
<td></td>
<td>Cost-, customer-, competition-oriented pricing approaches</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Breakeven analysis</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. 11/5</td>
<td>3. Place (Channels of Distribution)</td>
<td>Ch. 11</td>
<td>Read Assigned Chapter and Prepare for Case Discussion</td>
</tr>
<tr>
<td></td>
<td>Channel management: multiple channels, electronic channels, vertical marketing system</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Part 5: Communicating the Value Offering through the elements of Integrated Marketing Communications

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Assigned Chapters</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>11. 11/12</td>
<td>4. Promotion (Communications Strategy)</td>
<td>Ch. 12</td>
<td>Read Assigned Chapter and Prepare for Case Discussion</td>
</tr>
<tr>
<td></td>
<td>Promotion mix</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Strengths and weaknesses of each promotional element</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>How to design an integrated marketing communication campaign</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12. 11/19</td>
<td>Implementation Schedule and Financials</td>
<td>Ch. 16</td>
<td>Due: 4 P's Presentation: Product, Pricing, Place and Promotion (part of class contribution grade)</td>
</tr>
<tr>
<td></td>
<td>Marketing Metrics</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Marketing Action Plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Financial Projections</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Marketing Budget</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Controls and Contingency Planning</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Key Dates

- **8. 10/22**: Product/Service as the Core Offering
  - Gap Analysis
  - Service Quality
  - Read Assigned Chapter and Prepare for Case Discussion
  - Due: Case Analysis
  - Pahalwan’s: Need for a New Marketing Strategy
  - Jyoti Sharma; Subhadip Roy, Harvard Business Publishing, W14488-PDF-ENG

- **11/26**: No Class

- **12/3**: Advertising, Sales Promotion and Public Relations
  - Marketing Plan Presentations
  - Read Assigned Chapter and Prepare for Case Discussion
  - Due: Strategic Marketing Plan - Group Presentation

- **12/10**: Marketing Plan Presentations
  - Due: Strategic Marketing Plan - Group Presentation
  - Due: Strategic Marketing Plan - Group Final Paper
  - Due: Teammate Evaluation Form

- **12/17**: Bringing It All Together
  - Recap, Evaluation and Takeaways
  - Celebration
  - Due: Key Learnings - Group Presentation
  - Due: Class Evaluation Form
ASSIGNMENTS

**Written Assignments** should be handed in on the date that they are due. An electronic copy of your written assignment should be sent to me before the class starts. If you absolutely cannot attend class, please send an electronic copy of your written assignment before the class starts.

Each group should hand in a printed copy of their **Presentation** (4-6 slides per page) in the beginning of the class, send an electronic copy of their presentation before the class starts, and bring their presentation on a flash drive that has been tested. Do not assume that the PowerPoint presentation will open after it is copied to the flash drive. Test it on another computer to make sure the file opens and runs. Also, bring a backup copy on another flash drive and test it as well.

---

**INDIVIDUAL WRITTEN CASE ANALYSIS GUIDELINES**


**General Guidelines**

Your report should be no longer than five typewritten pages—double-spaced, 1-inch margins, 12-size font, with page numbers, and stapled (no plastic covers). Additionally, you can have up to two exhibits as an appendix. Late reports will not be accepted.

Assume the role of a marketing consultant brought in to advise Pahalwan's owner Anant Ram Abrol. Your report should be addressed to him.

To write your report, please follow the steps below:

1. Skim the case quickly to get an overview of the situation it presents.
2. Read the case thoroughly to digest the facts and circumstances.
3. Carefully review all the information presented in the exhibits and take notes if necessary
4. Decide what are the key issue(s) that Pahalwan's is facing
5. Conduct situation analysis, secondary market research, buying behavior analysis, marketing strategies and value offering analysis
6. Provide your recommendations for the key issue(s) that you identified
7. Support your diagnosis and opinions with reasons and evidence
8. Provide an appropriate action plan

The sections of your report should be the following:

- Executive Summary
- Key Issue(s)
- Recommendations and Rationale
- Action Plan
- Appendices: SWOT Analysis, Secondary market research main findings, buying behavior analysis, marketing strategies and value offering analysis

**Grading:**

I will be looking for completeness, internal consistency, justification, flow and professionalism. Most important is whether you identify the most critical issues in your analysis and if your proposed plan addresses them in a realistic way. Your written case analysis will contribute 30% to your course grade.
Step #1: Form your team DUE 9/10. Teams will consist of 5 students per team.

Step #2: Pick a project DUE 9/17. This will be the project that you research and for which you will develop a marketing plan.

Step #3: Oral Presentation of the Situation Analysis DUE 9/24. Prepare and deliver a 5-minute presentation (strict time limit). Use PowerPoint to present the highlights of your analysis. All members of your team must present. Be prepared to answer questions and explain your analysis. This Oral Presentation won't be graded as a separate assignment but as part of your contribution to the class learning. The purpose of this assignment is to give you feedback on how to proceed with building your marketing plan.

Step #4: Oral Presentation of the Consumer Behavior Research and Marketing Strategies DUE 10/8. Prepare and deliver a 5-minute presentation (strict time limit). Use PowerPoint to present the highlights of your analysis. All members of your team must present. Be prepared to answer questions and explain your analysis. This Oral Presentation won't be graded as a separate assignment but as part of your contribution to the class learning. The purpose of this assignment is to give you feedback on how to proceed with building your marketing plan.

Step #5: Oral Presentation of the 4 P's Product, Pricing, Place and Promotion DUE 11/19. Prepare and deliver a 5-minute presentation (strict time limit). Use PowerPoint to present the highlights of your analysis. All members of your team must present. Be prepared to answer questions and explain your analysis. This Oral Presentation won't be graded as a separate assignment but as part of your contribution to the class learning. The purpose of this assignment is to give you feedback on how to proceed with building your marketing plan.

Step #6: Strategic Marketing Plan Paper DUE 12/10 (10-15 pages) & Oral presentation DUE 12/3 (half the class) and 12/10 (the other half). Prepare and deliver a 20-minute (strict time limit) oral presentation of your marketing plan, using PowerPoint and focusing on the highlights of your marketing analysis, plan and recommendations. All members of your team must present. The presentation should be a logical, succinct and compelling executive summary presentation of the situation analysis and marketing plan. You should be prepared to answer questions and explain your recommendations.

A marketing plan starts with general information on the background necessary for understanding the products or services the organization is offering to very detailed information on how it is going to market the products and/or services to its customers.

### OUTLINE

#### Three-Year Strategic Marketing Plan (10-15 pages + Appendices)

I. Executive Summary (1 page)
An executive summary provides an overview of the key findings from the situation analysis and the marketing strategy recommendations made in the plan. Show how the plan helps to address needs in the customer market and how it will address competitors.

II. Company Description (0.5 Page)
This is a high level review of the different elements of the company, its target market, core competencies, competitive advantage, and the industry in which it operates. This section also includes the company's mission, vision and core values.
III. **Product or Service Description (0.5 page)**
This is a brief description of the company’s product and/or service, including summaries of current marketing strategies (including current target markets) and current market performance (market share, financials, etc). In this section you will describe the current state of the business that sets the stage for your marketing plan.

IV. **Situation Analysis (2.5 pages)**
This section gives the reader information on the micro-and macro-, internal and external environments relevant to understanding the context for and the rationale behind the marketing plan. It is the vital background that sets the stage for your strategic and tactical proposals. After completing each section of analysis, be sure you are drawing out the marketing implications – don’t just list the facts, give the analysis, and then the strategic implications. Present the data for Macro-level external environment analysis, competitive Porters Five Forces analysis, internal and SWOT analysis in tables, and then use your text to pull out the strategic implications for marketing.

- **SWOT Analysis** - based on your External, Internal and Competitive (Porter's Five Forces) Environment analysis

V. **Consumer Behavior Research (2 pages)**
Use this section to summarize the findings and analysis from your primary and secondary consumer behavior research. Include:

- **Research Methodology and Research Limitations:**
  - i. Primary Research: 5 In Depth Interviews, 1 Focus Group, 2 Observations, Survey answered by 30+ people
  - ii. Secondary Research
  - iii. Netnography Research
- **Key Research Findings and implications**
- **Consumer Needs Analysis**
- **Consumer Decision Making Process**

VI. **Critical Issues (0.5 page)**
Based on the above analyses, what 3-5 critical issues is your company facing? These are the issues that you will be directly addressing in the marketing plan. This also is an extremely important section, as it provides the direct link between your analysis and your plan.

VII. **Marketing Goals and Objectives (0.5 page)**
In this section list your marketing and financial goals and objectives. These goals and objectives should be specific with respect to magnitude and time. Objectives and goals must be arranged hierarchically, from most to least important; they should be quantitative whenever possible, realistic and consistent.

- **Goals**
- **Objectives:** Your marketing and financial objectives. These could include marketing objectives such as revenue/sales, awareness, market share, customer satisfaction, or loyalty; or financial objectives such as profit or contribution. Usually you include some of each.

VIII. **Marketing Strategies to Create Value (2 pages)**
Each of the following should be described as specifically as possible, and with strategic justification given in light of the major issues pointed out in the previous section.

- **Segmentation Strategy:** Divide the market into meaningful smaller markets or submarkets based on common characteristics. Define the main segments of your market. What characteristics define these segments? What are your segmentation strategies?
- **Target Marketing:** Evaluate the market segments and make decisions about which among them is most worthy of investment for development. Who have you identified as the most appropriate segment (target) for this product/service? Create a profile of a typical target consumer and describe them in specific detail. Why have you chosen this target market over others? Discuss customer lifetime value of your segments and discuss how much marketing expenditure you will spend on acquiring and retaining customers.
Positioning Strategy: How do you want your product to be perceived by your target market? What are key points of competitive differentiation, highlighting your points of difference and points of parity? Be sure you include an explicit positioning statement here that reflects the key value proposition you are recommending. Why is this a strong positioning strategy?

IX. Capturing Value through the Marketing Mix (2.5 pages)

- **Product/Service Strategies:** Define your service/product features and benefits and performance characteristics versus competitive products. How does the product/service fulfill the value proposition? What product/service changes are you recommending? What attributes do you want to add/delete to your product/service? What do you recommend in terms of changes to package design, logos, and/or brand identity? This may include the service promise, including any customer service and warranty information. What new products/services do you want to launch under your current brand name? Provide rationale for your choices.

  ⇒ Branding Strategy: Compare the brand knowledge and brand meanings that you want consumers to know about your brand (your brand identity) with your existing brand image. How will your existing brand enable and constrain you as you address your critical issues? What do you need to do on the branding front to achieve your goals?

- **Pricing Strategy:** Outline your pricing objectives and explain how they relate to your financial and marketing objectives. Present a list price for your product that retailers will pay you. Discuss payment terms/options including any discounts and allowances you will give to your retailer customers. Estimate your cost of good sold and calculate your product’s total revenue, total costs, and gross margin. Recommend a suggested retail price for your retailers and outline your expectations for retail pricing (both everyday and promotional) in each channel of distribution you plan to sell your product in. Calculate each channel’s penny profit and retailer margin rate. Discuss how you will balance pricing issues amongst different channels. Provide rationale for your choices.

- **Place Strategy:** Define your distribution strategy. In which retail channels do you want to sell your product? Why? Provide rationale for your choices. Define your selling approach. What selling message will you use to persuade your retail partners to carry your product?

- **Promotion Strategy:** Outline your integrated marketing communications (IMC) objectives. Design promotion programs to communicate your marketing message to consumers. Discuss if/how/why you will use the following promotion tactics: advertising (TV, print, radio, outdoor, Internet), consumer sales promotions (displays, price promotions, gift with purchase, sweepstakes/contests), event marketing/sponsorships, public relations, trade show and conference participation, direct marketing (mail, telephone, email), Internet marketing and Web 2.0 social media programs and other forms of communication. How will the customer receive information about the product? Be specific about what role each medium will play in the strategy and fulfilling the overall marketing objectives. What is the recommended timing and frequency of the marketing communications plan? How much will you spend on marketing communications?

X. Implementation Schedule and Financials (1 page)

In this section, you describe how you will implement the above strategy, with specific action steps identified. This section also contains key financial information.

- **Metrics:** What is the Return On Marketing Investment (ROMI)? Market Size and Market Share Analysis (Projected) (Given your projected level of sales, what will your unit and dollar market share be?) Market Penetration, Margin on Sale, Customer Lifetime Value (CLV), etc.

- **Action Plan:** Discuss timing, decide who should be responsible for the various aspects of implementation, and indicate the recourses necessary to implement the marketing plan.

- **12 Months and 3 Years Sales Projections:** Use realistic estimates. Divide your projected monthly sales into "Categories", which are natural divisions that make sense for your type of business. Typical categories are product types or lines. You might also indicate departments, branch locations, customer groups, geographical territories, or contracts, depending on your business. The forecast should be based on your historical sales, the marketing strategies that you have described, your market research, and industry data. Consider seasonal or other periodic and dependable fluctuations. Be sure to build these fluctuations into
your projections for the coming 3 years. Include the actual previous sales and the assumptions you made in projecting your future monthly and annual projections.

- **Marketing Budget:** Forecast the needed expenditures to implement the marketing plan that you built.

### XI. Controls and Contingency Planning (1 page)

In this section, you describe how you will measure success, and also describe your contingency plans and caveats.

- **Monitoring and Control:** Here you would describe your marketing dashboard, with any recommended marketing research, and ongoing data gathering, including benchmarks and measures of success. How do you know if you are succeeding or not? When and how do you take measures, and what measures would you take?

- **Anticipated Competitive Response:** Here you will outline how you expect your competitors to respond to your marketing plan and how that will affect your execution of the plan.

- **Risk Analysis and Contingency Planning:** What assumptions are you making, and what are the most crucial risks? Provide contingency plans should your monitoring and control measures indicate a problem.

### XII. Conclusion (1 Page)

### XIII. Appendices

*These should include charts, tables, and diagrams that support your text.*

---

**ADDITIONAL INFORMATION**

**Format:** Follow the marketing plan outline that was provided to you.

**Length:** 15 pages maximum for the Marketing Plan, double-spaced, not including appendices. You are highly encouraged to include exhibits and tables for data and numerical analysis as appendices.

**Financials:** The normal financial information requirements of a full-scale marketing plan are beyond the scope of this class. However, financial analysis, market size estimates, marketing expenses, and sales forecasts for your marketing plan are expected. Please use secondary research to try to find feasible numbers for your financial analyses. If you are unable to find estimates for the numbers you will need to run your financial analyses, please make well-informed estimates and document your assumptions.

**Grading:** I will be looking for completeness, internal consistency, justification, flow and professionalism. Most important is whether you identify the most critical issues in your analysis and if your proposed plan addresses them in a realistic way. Your strategic marketing plan will contribute 35% to your course grade. 10% of this will come from your marketing plan group presentation, 20% from your marketing plan paper, and 5% will come from your teammates’ evaluation of your contribution in building the marketing plan.

---

**KEY LEARNINGS - GROUP PRESENTATION GUIDELINES**

Prepare and deliver a 5-minute presentation (strict time limit). Use PowerPoint to present the highlights of what you have learned during the class and how it will assist you in achieving further academic and work related goals. All members of your team must present. Please send me your presentation prior to class. **DUE 12/17**

Your presentation should cover the following:

- Key learnings and main skills that you have improved, insights that you have secured, or knowledge that you have gained.

- Your plan in using these skills/insights/knowledge to achieve further academic and work related goals.