

Concepts of Marketing | MEJO 475.1 | Fall 2019

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Class: Mon. and Wed. 11am to 12:15pm

Office Hours: Thurs. 12:30 to 1:30pm & by appt.

Site: <http://sakai.unc.edu>

Note: The course syllabus is a general plan for the course; changes announced to the class by the instructor may occur.

Course Description

This course teaches the vocabulary and basic concepts of marketing as it will be practiced in a digital and social world. The course emphasizes the role of marketing communication within the larger business context from both the client and agency perspectives.

Required Materials

- Marketing: An Introduction (14th edition) by Gary Armstrong and Philip Kotler (2017)
- HBR Case Studies – purchase instructions forthcoming.
- Assigned Sakai Readings

Sakai

We will use a Sakai website to organize class documents and post them for you to download. You can reach the log-in page at sakai.unc.edu. You will need your Onyen and password to log in. The PowerPoint slides for each day's lecture will be available in a PowerPoint file on the course Sakai site. Before coming to class each day, please access and read the PowerPoint slides for that day's lecture so that you'll have your own file of the slides in class and be familiar with the content before class. Many students open the PowerPoint files in the "Notes" view and take notes on their laptops during class in the notes space under each slide. ALSO: Readings from the Internet and other sources are indicated in the schedule and are available either on the Sakai site or on the Web via the Internet. You will need Internet access and will need to monitor the course Sakai site and your UNC email account on a regular basis for important course information, announcements and digital PDF "handouts."

Electronic Devices:

All electronic devices must be silenced and stored away during class. However, you may use a laptop (or similar device, i.e., electronic pad) ONLY to create class notes on the PowerPoint slides (open PowerPoint file in "Notes" view) or using word processing software. All other applications must be closed (no texting, messaging, Facebooking, Instagramming, etc.). Any non-class related use of laptops (or other electronic devices) during class is not permitted and may cause you to lose your laptop privileges for the semester at a minimum. This policy also holds true for when we have guest speakers. Unless you are taking notes, laptops should be closed to allow you to fully engage with these industry experts who are giving their valuable time to enhance your learning experience.

Email Correspondence

All course-related email messages will be sent to your official UNC email address ONLY via UNC email, Sakai and/or ConnectCarolina. In addition, all course-related email messages that you send to the instructor and graduate teaching assistant should be sent using your official UNC email address ONLY please. Emails sent from other domains (i.e., gmail, hotmail, yahoo, etc.), especially with attachments, often are trapped by the UNC spam filters and not delivered. Please check your UNC email account regularly and be sure to clean out your “inbox” so that incoming email will not get “bounced.”

Course Overview & Objectives

This course is a survey course designed to help you understand what marketing is, what marketing people do, and how they interact with other corporate functions such as manufacturing, distribution, and research and development. Although the course is similar to the marketing course offered in the Kenan-Flagler School of Business, it is taught with the assumption that students are more oriented toward marketing communication and are as likely to work for an agency or media company as for a goods and services provider. As a result, we will spend less time on topics such as physical distribution and inventory management and explore in more depth the role and function of marketing communication in every part of the business process.

In the past, advertising and public relations professionals were often perceived as tacticians – other people made the strategic decisions about what was to be communicated, to whom and why. Marketing communication professionals today are expected to take a much more active role in the whole marketing process. You will be held accountable not just for your functional proficiency, but also for making measurable contributions to your firm’s or client’s business growth and profitability.

This course is ideal for anyone who aspires to be an advertising or marketing public relations manager for either a consumer products marketer (e.g., Procter & Gamble), a business-to-business company (e.g., IBM) or an account service manager for an advertising or public relations agency. It is also relevant to someone who wants to run his or her own business someday. People who want to work for non-profit organizations also will be able to use what is taught in the course – fundraising requires marketing thinking, as will those in the field of public health who want to “market” healthy behaviors. Finally, it is also helpful for those who want to work in creative. Understanding what the client is trying to accomplish (and why) will increase your chances of doing work that not only wins awards, but contributes to the bottom line – and therefore helps the agency to keep the account.

By the end of this course you will:

- Understand marketing’s role in strategic planning and how marketers work with upstream and downstream partners to create and deliver customer value.
- Know how to design a customer-driven marketing strategy and marketing mix.
- Understand the elements of the marketing mix (production, promotion, pricing and distribution).
- Understand the major factors that influence consumer behavior.
- Understand the similarities and differences between product and services marketing.
- Apply marketing concepts to business case studies.

Course Format

Prior to each class, it is expected that you will have read the assigned chapter and Sakai readings. During class, I will answer any questions you may have about the readings. We will spend the balance of the class period applying the concepts to current events and case studies.

Class Participation

Class participation is essential to this course. To that end, we will use a physical “chip” or token system to ensure that all students participate in each class session. You will receive a chip when you first participate (i.e. speak) in each class. I will then continue to ask questions, but I will first want to hear from someone who does not yet have a chip. Only when everyone has had a fair chance to earn a chip will I open up responses to a ‘first-come – first serve’ model. DO NOT LOSE YOUR CHIPS! At our last class session I will collect them from each student and count them. I will use that count to determine your class participation score. In this fashion, you will all have an equal opportunity to receive the maximum possible class participation score, but only if you participate – and attend – every class.

Attendance Policy

Attendance is essential to this class. Crucial information for exams and assignments will come directly from class and may not be covered in the readings. Roll will be called verbally precisely at 11am. If you are late, it will count as ½ an absence. It is your responsibility to see me after class to confirm I have you marked as present. You are provided with three pre-excused absences: do not squander them! ***If you miss more than three classes, your final grade will be reduced by one overall semester percentage point per class missed after the three absences.*** Example: Your semester work results in a 91% grade (A-). You miss five classes. Final grade = 89% (B+).

Course Requirements

Fair warning – we will cover a lot of territory over a short period of time. To do well in the class you will need to:

- Attend all classes and actively participate in discussion. Really. It will be very difficult to capture all the information given in lecture from someone else’s notes, and there is a large amount of material over the semester.
- Complete assigned readings for each class session. The lectures and class discussions will illustrate and expand upon what you’ve read, but not substitute for it.
- Complete a marketing brief that requires you to apply marketing principles and compare and contrast those principles across different brands/organizations.
- Complete three exams which may include questions on material covered in the book that won’t necessarily have been talked about in class. Don’t get behind; it’s difficult to catch up.

Exams

There are three exams during the semester. Exam questions will cover material from the text, class lectures and discussions. Questions will include multiple-choice, short-, and long essay. The final exam will include a cumulative component, requiring you to integrate concepts from the entire course. The final exam is scheduled for Monday, April 29th from 12pm to 3pm. All exams will be given in our classroom using the class Sakai site, therefore you will need a laptop with which to select and write your answers. No makeup exams will be given without prior arrangement before the scheduled exam date and time. If you have received an evaluation from ARS, <http://ars.unc.edu> that results in exam accommodations, you must inform me one week prior to the exam so that I may make suitable arrangements.

Company Mini-Cases

Throughout the semester, students will be assigned a number of mini-cases from the textbook. Answers to assigned questions should be posted to the Assignment section of the Sakai site before 7am the morning of the class. Cases will be discussed in class and written submissions will be graded on a 10-point scale. The final case study scores will be worth 7% of your final grade.

Assignments

Each student will complete two assignments during the semester: a SWOT analysis (**due September 3rd**) and a marketing brief (**due on November 7th**). Details about each assignment are provided within the syllabus, including due dates. Late submissions will not be accepted.

Research Requirement

Each undergraduate student is required to complete **two hours** of research over the course of the semester. There are two ways you can fulfill this requirement. The first way is to participate in two hours of academic research studies in the School of Media and Journalism. Participating in studies is a valuable way for you to receive first-hand experience with mass communication research. You will be able to sign up online to participate in these studies. The second way to fulfill the requirement is to write two two-page reports. Each report counts for one hour of research participation, so you can combine participation in the studies with article reviews to fulfill the research requirement. For your report, **which is due at 9:30am, in printed format, at the beginning of the class on Tuesday, November 26th**, you may:

- Summarize any article published in the past two years in the following journals that pertains to marketing: Journal of Public Policy and Marketing, Journal of Advertising Research, Journal of Advertising.
- Select a publicly traded company and write a review of that organization. Please include the company name, size, a brief company history, parent company (if applicable), clients or brands, recent company news (major news from past year), and your opinions about the company's mission statement and positioning.

Grading Scale

A =	93-100%	B- =	80-83%	D =	60-69%
A- =	90-92%	C+ =	77-79%	F =	<60%
B+ =	87-89%	C =	74-76%		
B =	84-86%	C- =	70-73%		

Grading Policy

No substitute dates will be given for exams except for when a student has three final exams scheduled on the same day. This substitution requires formal approval by the undergraduate senior associate dean. Evaluation components will be weighted as follows:

Exam 1	20%
Exam 2	20%
Exam 3 (Comprehensive)	24%
In-Class Cases	7%
Assignment #1: SWOT	8%
Assignment #2 Marketing Brief	20%
Research Requirement	1%
TOTAL	100%

Professional Obligations

- **Honor Code:** You are expected to conduct yourself within the guidelines of the [University honor system](#). All academic work should be done with the high levels of honesty and integrity that this University demands. You are expected to produce your own work in this class. You may retrieve the full document, [The instrument of student judicial governance](#).
- **Diversity and Inclusion:** The School of Media and Journalism adopted [diversity and inclusion mission and vision statements](#) in spring 2016 with accompanying goals. It complements the University policy on [Prohibiting Harassment and Discrimination](#). In summary, UNC is committed to providing an inclusive and welcoming environment for all members of our community and does not discriminate in offering access to its educational programs and activities on the basis of age, gender, race, color, national origin, religion, creed, disability, veteran's status, sexual orientation, gender identity, or gender expression.
- **Harassment:** UNC does not tolerate harassment based on gender, race, religion, sexual orientation, culture, disability, or for any other reason. It is also a violation of the Honor Code and Title VII of the Civil Rights Act (1964) and Title IX of the Educational Amendments. If you need assistance with a harassment issue or problem, bring it to my attention or The Office of the Dean of Students, dos@unc.edu or 919/966-4042.

Special Accommodations

The University of North Carolina at Chapel Hill facilitates the implementation of reasonable accommodations, including resources and services, for students with disabilities, chronic medical conditions, a temporary disability or pregnancy complications resulting in difficulties with accessing learning opportunities. All accommodations are coordinated through the Accessibility Resources and Service Office. See the ARS Website for contact information: <https://ars.unc.edu> information or email ars@unc.edu. Relevant policy documents as they relate to registration and accommodations determinations and the student registration form are available on the [ARS website under the About ARS tab](#).

Accrediting Values and Competencies

The School of Media and Journalism's [accrediting body](#) outlines values you should be aware of and competencies you should be able to demonstrate by the time you graduate from our program. No single course could possibly cover all the values and competencies; but collectively, our classes are designed to build your abilities in each of these areas.

In this class, we will address the following values and competencies:

- ✓ Understanding concepts and applying theories in the use and presentation of images and information;
- ✓ Conducting research and evaluating information by methods appropriate to the communications professions in which they work;
- ✓ Thinking critically, creatively and independently; and
- ✓ Applying basic numerical and statistical concepts.

Concepts of Marketing/Fall 2019 Class Schedule (Posted 8.19.19)

Date	Topic & Deliverables	Required Preparation
Tu. Aug. 20	Personal Introduction, Course Introduction and Overview	n/a
Th. Aug. 22	*Marketing – Capturing Customer Value Video: Eskimo Joe	Read: A&K – Chapter 1 Read: Chick-fil-A Case p. 525 and answer and upload questions 1-3
Tu. Aug. 27	Strategic Planning, Marketing Strategy and Partnerships Video: The Fall of Kodak	Read: A&K – Chapter 2
Th. Aug. 29	*Analyzing the Marketing Environment	Read: A&K – Chapter 3 Read: Fitbit Case, p. 529 and answer and upload questions 1-3
Tu. Sept. 3	Managing Marketing Information with the MIS Video: Domino's Pizza <i>Due to Sakai/Assignments: SWOT Analysis</i>	Read: A&K – Chapter 4 Read: Sakai: Domino's Pizza
Th. Sept. 5	Understanding Consumer Behavior	Read: A&K – Chapter 5 Read: VALS: http://www.strategicbusinessinsights.com/vals/ustypes.shtml Take Survey/find type: www.strategicbusinessinsights.com/vals/presurvey.shtml Complete: Eating observation assignment
Tu. Sept. 10	*Marketing Strategy Video: Boston Harbor Cruises	Read: A&K – Chapter 6 Read: 5-Hour Energy Case, p. 535 and answer/upload questions 1-2 Complete Zip Code Lookup/Hometown: https://claritas360.claritas.com/mybestsegments/?_ga=2.50251054.962053897.1548949493-1007117418.1548949493#zipLookup
Th. Sept. 12	Case Study and Review	Read: TBD
Tu. Sept. 17	Exam #1 (Chapters 1-6) <i>Market Brief assignments announced</i>	Read: Sakai: Exam article
Th. Sept. 19	Product & Service Strategy	Read: A&K – Chapter 7 Reference: Sakai: P&G Lines
Tu. Sept. 24	*Brand Strategy Video: Swiss Army Knife	Read: A&K – Chapter 7 Read+Answer: MINI Case Study, p. 537. Answer/upload questions 2, 3
Th. Sept. 26	New Product Development	Read: A&K – Chapter 8
Tu. Oct. 1	Design Thinking and Emerging Technology, Professor Steven King <i>Due: Ranked list of companies for market briefing assignment</i>	Read: Sakai: Design Thinking Read: Sakai: Artificial Intelligence
Th. Oct. 3	<i>Guest Speaker:</i> Todd Cantrell, Disruptive Industries	Read: Sakai: TBD
Tu. Oct. 8	*Pricing Strategy Video: Hammerpress Printing	Read: A&K – Chapter 9 Read: Trader Joe's Case, p. 541. Answer/upload questions 1-2

Date	Topic & Deliverables	Required Preparation
Th. Oct. 10	*Marketing Channels Videos: Gavina Coffee, Progressive Insurance	Read: A&K – Chapter 10 Read: Target Case, p. 543, answer/upload questions 1, 2, 4
Tu. Oct. 15	Guest Lecture: Kevin Nathanson, Logistics	Read: Sakai: Logistics
FALL BREAK – NO CLASS THURSDAY 10/17		
Tu. Oct. 22	*Retailing and Wholesaling Video:	Read: A&K – Chapter 11 Read: Bass Pro Shops Case, p. 545, answer/upload questions 1-3
Th. Oct. 24	Case Study & Review for Exam	Read: Sakai: Canada Goose Case
Tu. Oct. 29	Exam #2 (Chapters 7-11)	Read: Sakai: Exam article
Th. Oct. 31	Paid, Earned, Owned, Shared	Read: A&K – Chapter 12 Read: Sakai: Hunger Games, Catching Fire
Tu. Nov. 5	Sales Promotion and Personal Selling Video: Medtronic, Nudie	Read: A&K – Chapter 13
Th. Nov. 7	Direct and Online Marketing Due to Sakai: Marketing Briefs	Read: A&K – Chapter 14
Tu. Nov. 12	Attribution Modeling: Drew Ford, iProspect	Read: Sakai: TBD
Th. Nov. 14	<i>Guest Speaker</i> Danielle Passingham, Digital Brand Manager, Peter Millar	Review: www. Petermillar.com
Tu. Nov. 19	Competitive Advantage	Read: Sakai: Porter's Five Forces
Th. Nov. 21	Blue Ocean Strategy	Read: Sakai: Blue Ocean Strategy
Tu. Nov. 26	Marketing Briefing Review	Review: Your marketing brief submission
THANKSGIVING BREAK – NO CLASS THURSDAY, NOV. 28		
Tu. Dec. 3	<i>Guest Lecture:</i> The Invisible Brand: William Ammerman	Read: Sakai: Invisible Brand
Th. Dec 12	FINAL EXAM: 12pm to 3pm (Comprehensive)	

*denotes dates when Company Case responses due.

MEJO 475: CONCEPTS OF MARKETING | FALL 2019

SWOT Analysis Assignment

Due @ 5pm Tuesday, Sept. 3 (upload to Sakai site/Assignment)

Value: 10% of Course Grade

A **SWOT analysis** evaluates an organization's overall strengths (S), weaknesses (W), opportunities (O), and threats (T). Strengths include internal capabilities, resources, and positive situational factors that may help the company or organization to serve its customers and achieve its objectives. Weaknesses include internal limitations and negative situational factors that may interfere with the organization's performance. Opportunities are favorable factors or trends in the external environment that the organization may be able to exploit to its advantage. And threats are unfavorable external factors or trends that may present challenges to performance.

The SWOT analysis summarizes the current situation – a snapshot in time. It then informs planning. Objectives should logically follow conclusions from the SWOT analysis, and the strategy recommended should support the objectives.

In 1965, more than 40 percent of American adults were smokers. That percentage has now fallen to less than 18 percent. Tobacco companies have dealt with this threat by developing new markets overseas and also developing alternative nicotine products such as electronic cigarettes (e-cigarettes). Juul is one such company and tobacco giants Marlboro and Altria have ownership stake in the company.

Imagine you are part of Juul's marketing team. Review the information below and create a SWOT analysis for Juul. You may work alone or with one partner. If working with a partner, please make sure both names are on the assignment and have the one partner upload to Sakai. Feel free to use bullet points, but be sure to include enough detail to get your point across. In other words, I'm not a mind-reader!

<https://www.fda.gov/tobacco-products/rules-regulations-and-guidance/fdas-deeming-regulations-e-cigarettes-cigars-and-all-other-tobacco-products>

<https://www.theverge.com/2018/10/31/18047790/electronic-cigarettes-vaping-juul-myblu-vuse-logic-fda-crackdown>

<https://www.juul.com> – the “Our Mission” and “About Us” sections

<https://www.cnn.com/2018/03/15/health/juul-e-cigarette-partner/index.html>

<https://www.cnn.com/2019/07/03/health/juul-social-media-study/index.html>

<https://www.nytimes.com/2019/06/19/science/juul-meharry-grant-vaping.html>

<https://www.politico.com/story/2019/07/09/san-franciscos-electronic-cigarette-ban-juul-1562168>

<https://www.medicalnewstoday.com/articles/216550.php>

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Marketing Brief and Analysis

Due: October 1 – List of Companies

Due: November 7 6pm – Marketing Brief (upload to Sakai site/Assignment)

Value: 20% of Course Grade

What is a Marketing Brief?

A marketing brief is a written guide prepared for a company that focuses on its marketing strategy, tactics, and operations. It includes facts and history about marketing activities and captures the company's competitive landscape.

The purpose of this assignment is to have you understand the basic financial performance of a company, its position in the marketplace, and to consider what its marketing strategy should be moving forward. In doing so, you will apply the marketing concepts and tools covered in class. The final briefing paper should be focused and cohesive. A successful briefing paper will require a minimum investment of 15 hours. Make sure you adequately describe the current situation based on the resources and then articulate recommendations in the analysis section. The analysis section should reflect your own thinking while the description section represents facts/status.

Step One: Company Selection (due September 3rd).

- ✓ Pick five publicly traded companies with readily available marketing information (don't assume you'll be able to find information later if your search today doesn't show much).
- ✓ Use business publications, industry journals, news stories, etc. to surface companies you are interested in.
- ✓ Avoid monstrous complexity, i.e. Amazo-type, 'we do everything' companies
- ✓ Pick some area that you like or have some personal interest in (e.g., employment, hobbies, experience)Experience
- ✓ No personal connection to company
- ✓ Sources of information MUST be public
- ✓ Do not plagiarize—no large-scale 'lifting'
- ✓ Every student will do a different company; this is NOT a group project
- ✓ Your structure should be driven by the company and its marketing strategy/activities; One size will NOT fit all

Required Resources

- Most recent Annual Report
- SWOT Analysis (Business Source Premiere database available from Park Library home page)
- Company website
- Minimum of five additional resources from January 2019 to present in the Wall Street Journal, New York Times, Fortune, Fast Company, analyst reports from Bloomberg, or Mintel reports. These resources must be cited in a bibliography. (*Note – the Market Research and/or Industry Profile categories on the BSP database will yield excellent background information*).

Description Section:

- Company (operational) overview
 - The ‘who, what, when, where, why, and how’ of what the company does.
 - Mission/vision/values.
 - How the company is organized –its SBUs.
- Financial Overview
 - Very basic financial information accessible in the annual report.
 - Revenue and net income trend. Include FY2017 vs. 2016 (annual report) as well as second or third quarter 2018 (analyst reports or SWOT).
 - Interpretations of why (based on annual report and other sources).
- Market Overview/Market Space
 - Who are the competitors?
 - Is this a mature or emerging market?
 - What is the market share of the company in the category?
- SWOT Analysis based on resources. *This should be a snapshot in time – “Opportunities” should not be ideas about what to do next. Rather, what is happening in the external environment that the company could tap into.*
- Company Strategy
 - How has the company been addressing its challenges?

Analysis Section:

- Apply what you have learned to this company. *This will vary for every company; logistics may be absolutely mission critical to one company and almost a forethought to another one.*
- Select and describe the most important marketing elements/practices for your company. If you ran their marketing, what would your priorities be on your ‘to-do’ list? Why? Be sure to use the concepts and vocabulary you have learned in the course thus far.

Specifications:

- Three to four pages for the description section (single-spaced).
- Two to three pages for the analysis section (single-spaced).
- *Note that simply “dumping” information from the sources into these sections does not constitute quality. You need to use vocabulary from the course and demonstrate your understanding of concepts and ability to apply to a real-world company. In four-to-five pages, you should be able to state your briefing and analysis in a parsimonious manner.*