

## COURSE SYLLABUS

INSTRUCTOR	Professor Cassie Mogilner (pronounced Mo-gil-ner)
CLASS MEETINGS	Tuesdays and Thursdays Section 1: 9:00-10:30AM Section 2: 10:30AM-12:00PM
OFFICE HOURS	Anytime. Please email me, and we'll set up an appt.
CLASS POLICIES	Cell phones and laptops are not permitted in class.
COURSE MATERIALS	To keep costs down, there is no required textbook; instead we'll rely on a course reader, which incorporates a few chapters from some seminal books, cases, articles, and a packet of handouts. <sup>1</sup>
SUPPLEMENTAL READING	<p>A number of sources of additional information are available to further supplement the course readings which, depending on your career interests and goals, you may want to read at some point. None are required.</p> <p>There are several books that provide useful perspectives and ideas on brand and product management, Keller's <u>Strategic Brand Management</u>, Aaker's <u>Managing Brand Equity</u>, <u>Building Strong Brands</u> and <u>Brand Leadership</u> (with Erich Joachimsthaler), Lehmann and Winer's <u>Product Management</u>, Kapferer's <u>Strategic Brand Management</u>. From an industry perspective, Davis' <u>Brand Asset Management</u>, Davis and Dunn's <u>Building the Brand Driven Business</u>, and Scott Bedbury's <u>A New Brand World</u> are all good. Most students find the articles in the academic journals dry and abstract, but the <u>Journal of Marketing</u> and <u>HBR</u> have more of an applied focus that tends to be easier to digest.</p> <p>Finally, in terms of current industry information, <u>Business Week</u>, <u>Fortune</u>, <u>Forbes</u>, and <u>The Economist</u> have marketing articles frequently dealing with brand issues. The <u>Wall Street Journal</u> has a daily column in Section 2 on advertising that often addresses branding issues. Two useful industry trade publications are <u>Advertising Age</u> and <u>BRANDWEEK</u>. To find out more about various consumer characteristics or trends, see <u>American Demographics</u>.</p>

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<sup>1</sup> Many of these handouts are selected from Keller's, Strategic Brand Management (Prentice-Hall). This book is complete with examples, tools, benchmarks and theories regarding brand management.

## COURSE OVERVIEW

Which brands make you happy? Apple? Starbucks? The Daily Show? Google? What draws you into these brands? How do companies create compelling brand experiences? How could you cultivate a well-loved brand? This course explores such questions with the goal of identifying the ingredients for building and managing an inspired brand, where brand is defined as “a reputation” – departing from traditional perspectives of brand.

The class will involve a broad ecosystem of contributors. Leaders from the world of brand—both small entrepreneurial companies and large, global market-leaders—will be incorporated into the class to offer first-hand perspectives about the challenges and lessons along their varied paths to success. This approach is intended to make the walls between the classroom and the world outside a little more porous.

The course has been created for individuals interested in building their own brands and/or immersing themselves in the enhancement of an existing brand. The course will interweave lectures, guest speakers, case discussions, in and out of class exercises—all of which will culminate in a brand audit group project that students will present in the final days of class.

The course will provide students with an appreciation of the role of branding and (taking a consumer-centric approach) will augment students’ ability to think creatively and critically about the strategies and tactics involved in building, leveraging, defending, and sustaining inspired brands.

Broadly, the course will be divided into four parts:

1. Understanding Brand
2. Crafting Brand
3. Measuring Brand
4. Managing Brand

The courses’ basic objectives are to:

- Provide an appreciation of the role of branding in consumers’ daily experiences, in addition to creating shareholder value
- Increase fluency with the core principles underlying a consumer-centric approach to brand planning, and create familiarity with research tools that illuminate the meaning and strength of any particular brand
- Augment students’ ability to think creatively and critically about the strategies and tactics involved in building, leveraging, defending, and sustaining inspired brands
- Encourage the application of branding principles to oneself, to help be deliberate in communicating one’s personal and professional reputation

## CLASS STRUCTURE

The course is organized into four modules that collectively address the course objectives.

### **Module 1: Understanding Brand**

This module provides a basic understanding of branding: what a brand is, what functions brands serve, and when a branding strategy is relevant for consumers and the firm. The cases in this introductory module expose students to the underlying conceptual framework for the course in which brand meanings—resonant, unique, and well-managed over time—create brand strength, which in turn provides brand value to the firm in the form of competitive advantage, increased market share and profits, and reduced risks. The main sessions in this module focus on establishing the key foundations of a strong brand: value proposition, brand personality, brand positioning – and the distinction between brand image and identity.

### **Module 2: Crafting Brand**

This module provides a conception of what is involved in the formulation of the brand asset. The most important task in designing the brand is specifying the unique and relevant meanings the brand is to capture. These meanings, which are expressed in the form of a brand positioning statement and which can be conveyed visually in a mental map, provide the foundation for the brand design task as they form the theme around which the brand experience is framed and the marketing mix aligned. This module focuses on identifying brand elements (e.g., brand names, logos, slogans, jingles, package designs) that communicate brand meaning.

### **Module 3: Measuring Brand**

Once brand meaning is decided upon, and brand elements are aligned to capture and play back these meanings, the next task is to develop strength in the brand and measure that strength over time. The cases in this module cover traditional and non-traditional tools for measuring brand strength – both qualitative and quantitative measures (e.g., focus groups, ethnography, surveys and brand valuation).

### **Module 4: Managing Brand**

The cases in this final module focus on the challenges that confront more mature brands as they attempt to grow and stay relevant over time, and the stewardship skills and perspectives that enable sustained brand health. We explore the growth of brand equity through extensions, the development of consumer-brand relationships, strategic alliances between brands, and the management of ingredient brands. We also examine the design of brand portfolios to maximize equity for the firm, and investigate repositioning and revitalization strategies. Collectively, the cases in the module help to convey the complexity and significance of the long-term task of brand development.

## COURSE REQUIREMENTS AND GRADING

Your overall course grade will reflect your fulfillment of the requirements based upon the following weights:

Attendance	28%
Class Participation	15%
Individual Assignments	
Brand Relationship Interview	5%
Self Positioning Statement	1%
Personal Image-Identity Gap Write-up	5%
6 word Personal Story	1%
Brand Audit Project	
Brand Positioning Statement and Perceptual Map	5%
Ethnographic Insights	5%
Survey Insights	5%
Written Audit	15%
Presentation	15%
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TOTAL	100%

### Attendance

Because much of your grade is wrapped into the group project, and because assessment of class participation is necessarily subjective, I wanted to give you concrete control over a portion of your grade—and this will come in the form of attendance. Yes, I will take attendance. Each day of class is worth one percent of your grade (for a total of 28%). This means that while every day that you show up will raise your grade, everyday that you are absent will have a direct negative impact on your grade. You should notify me by email of any absences, but be aware that except for cases of grave illness, a death, or other emergencies, your grade will be hurt.

Classes start on time. (Lateness counts for  $\frac{1}{4}$  of a class absence). To help me keep track of attendance as accurately as possible and so I can get to know each of you individually, please use your name card and retain your seat once the seating chart has been passed around.

### Class Participation

- Class Contribution. Grading class participation is necessarily subjective. Some of the criteria for evaluating effective class participation include:
  1. Are you prepared? Do your comments show evidence of deep case analysis (vs. stating case facts)?
  2. Are the points made relevant to the discussion?
  3. Are you an effective communicator? Are concepts presented in a concise and convincing fashion?
- Case Analyses. I will randomly call on 1-2 students at the beginning of each class to help lead off a case discussion. You may be asked to come up to the lectern and address one of the case assignment questions or role play the case situation. Please be ready with your recommendations. Your performance on the case lead-off will be included in the class participation component of your course grade. Note that given the size of the class, some students may never be selected to lead off the case.

## Individual Assignments

There are four small individual assignments, three of which were designed to encourage you to apply brand concepts to your own personal brand. See “The Scoop” portion of the syllabus for their due dates, and the appendix portion of the syllabus for instructions for each assignment. Although these will be graded, their primary purpose is to generate discussion in class.

## Brand Audit Project

Students will form brand management teams to work on this project. Note: You are responsible for forming a four-person team for the purpose of group projects. Please take the time to put together a team that will work together well in terms of schedules, work places, different skills, etc. All groups must be formed by the start of the fourth class session.

Your assignment is to select a real brand (new or well-established) and conduct an audit for that brand. Every team must study a different brand, and brands are assigned on a first come, first serve basis. So, pre-approval with me is necessary (see below). Ideally, this should be a brand to which at least one member of the group has access so that you could get a briefing on the firm's situation from someone in a position of responsibility. Even more ideal - you would have access to some of their data on brand-building issues they are facing. Generally, the deeper you get into the company, the more insightful the project becomes and the greater the likelihood that your recommendations will be implemented and that you will have an impact. A startup that has not yet introduced a product is acceptable, so long as the product definition is sufficiently developed to allow for design of the brand audit. Feel free to pick a service (e.g., non-profit or profit) or product (e.g., consumer, technology).

The goal of the brand audit is to assess its sources of brand equity and suggest ways to improve and leverage that brand equity. Thus, brand audits are made up of brand inventories (comprehensive summaries of a firm's marketing and branding program) and brand exploratories (the results of empirical research, either focus groups, depth interviews or surveys; see below) - followed by a set of brand strategy and/or implementation recommendations for the company.

The final project will include a written proposal as well as an oral presentation to the class. Further details are provided below and will also be reviewed in class. Presentations will be given during class on April 20<sup>th</sup>, 22<sup>nd</sup>, and 27<sup>th</sup>. **Regardless of what day your group will be presenting, every group's written brand audit is due at the beginning of class on April 20<sup>th</sup>. Page limitations: 10 pages of text (single spaced); up to 5 pages of appendices.**

### Participation Assessment:

Each member of the group will be asked to assess the proportion of the work that each group member contributed to the overall brand audit. You will find the form in the syllabus appendix, and the completed form should be turned in by each member of the group on the day your group gives the final presentation. This information will contribute to my final assessment of each member's final grade for the brand audit.

The formal requirements for the brand audit project are four interim steps and a final paper, as follows:

### Interim steps:

- 1) A hand-in is due in the third week of class, January 26<sup>th</sup>. All you need to include is: the names of your team members and three options of brands on which you would like to focus. We hope to give you your first or second choice. **Be sure to also state your preferred date for**

**the Brand Audit Presentation: April 20<sup>th</sup>, 22<sup>nd</sup>, or 27<sup>th</sup>.** Again, we hope to give you your preference

- 2) On February 16<sup>th</sup>, you will be asked to hand in and briefly present a preliminary perceptual map and the positioning statement of your brand. These may be revised for your final project, but this is to get you started in applying what we learn in class to better understand your brand.
- 3) On March 23<sup>rd</sup>, your group will present any insights about your brand you garnered from your qualitative and quantitative investigations.

### Final Report.

The final report is due at the beginning of class on **April 20<sup>th</sup>** for every group. In it, you should convey your vision of a “mental map” for the brand in terms of the key brand associations.<sup>2</sup> You will have conducted some qualitative market research using ideas discussed in previous class sessions, the HBS case on Brand-Person relationships, and the readings. Conduct either two one-on-one interviews or one 6-8 person focus group, and one survey (you will have two pieces – complementing qualitative work with quantitative work). Find out about the brand associations, brand relationships, sources of equity, etc. How is this brand perceived by your informants? The final report will use all of this information to identify the sources of brand equity and provides the basis for your recommendations. Any questionnaire used to guide a focus group, depth interview or your survey should be included in an appendix in the final report.

After developing a detailed profile or mental map of brand knowledge structures from the brand exploratory, the next task is to provide recommendations concerning how the brand should be managed by analyzing the brand inventory. How can brand equity be built and how can it be effectively leveraged into new product categories to maximize profits? To answer this question, you should outline creative and relevant directions for management of your chosen brand, providing justification where appropriate with course concepts.

In total, this report should be **10 pages of text (single spaced)—which includes a one page overview and summary; up to 5 pages of appendices.**

### Oral Presentation.

Each team will have about 10 minutes to present their brand audit. These presentations should highlight the key insights from the Brand Audit, and can be presented as a PowerPoint presentation, in the form of a video, or any other compelling and engaging format—be creative! Presentations will take place on April 20<sup>th</sup>, 22<sup>nd</sup>, and 27<sup>th</sup>.

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<sup>2</sup> A variety of sources of information can be used to assemble this profile. For example, consult trade magazines and business publications, conduct your own research (see above), and consult with company sources. Note, it is not assumed that you will be able to gain any cooperation from the company. However, if you do receive cooperation, be careful taking company reports as gospel – they may have been conducted for a different purpose or even suffer from flaws in methodology and interpretation.

## THE SCOOP

#	CLASS	TOPIC	ASSIGNMENT/ READINGS DUE
1	January 14 <sup>th</sup>	Introduction: What is a Brand?	<b>Due:</b> Favorite Brands worksheet in syllabus appendix <b>Reading:</b> Course Syllabus <b>Additional Reading (not required):</b> "Brands and Branding," Holt (2003), <i>HBR</i>
2	January 19 <sup>th</sup>	MTV Case	<b>Prepare:</b> MTV Case
3	January 21 <sup>st</sup>	Understanding Brand Lecture Guest Lecture: Professor George Day, Chair of Wharton's Identity and Branding Committee	
4	January 26 <sup>th</sup>	Guest Lecture: Terry Young—Managing Director at Rapp, 21 <sup>st</sup> Century Building Blocks of Brands	<b>Due:</b> Each group must email me the names of the group members and 1 page describing 3 possible brands for Brand Audit Project
5	January 28 <sup>th</sup>	Brand Relationships Lecture	<b>Reading:</b> Exploring Brand-Person Relationships
6	February 2 <sup>nd</sup>	Time, Money, and Happiness Lecture	<b>Due:</b> Submit final decision for Brand Audit Project Submit Brand Relationship Interview Write-up
7	February 4 <sup>th</sup>	Starbucks Case	<b>Prepare:</b> Starbucks Case
8	February 9 <sup>th</sup>	Personal Branding Lecture	<b>Due:</b> Self Positioning Statement Personal Image-Identity Gap Write-up
9	February 11 <sup>th</sup>	Guest Lecture: Owen Tripp—COO of Reputation Defender	
10	February 16 <sup>th</sup>	Harley Davidson Case	<b>Prepare:</b> Harley Case <b>Due:</b> Positioning Statement for Brand Audit Perceptual Map for Brand Audit
11	February 18 <sup>th</sup>	Guest Lecture: Rob Kaplan—Brown-Forman, Branding Alcohol Responsibly	
12	February 23 <sup>rd</sup>	Crafting Brand Lecture	<b>Due:</b> Six word personal story Six word brand story <b>Reading:</b> Selecting a New Name for Security Capital Pac Trust Claiborne Asks Web Surfers To Name New Line Naming the Edsel
13	February 25 <sup>th</sup>	Got Milk? Case	<b>Prepare:</b> Got Milk? Case
14	March 2 <sup>nd</sup>	Guest Lecture: Ken Frieze—Principal of Gordon Brothers Group, Brand Valuation and the case of Polaroid	<b>Reading:</b> Strategic Brand Valuation: Cross Functional Maximizing Returns from Brand Spending Chapt. 9, Quantitative Research Techniques Chapt. 10, Interbrand Methodology
15	March 4 <sup>th</sup>	Measuring Brand: Qualitative Methods	
16	March 16 <sup>th</sup>	In class consulting for Brand Audit Project	
17	March 18 <sup>th</sup>	Guest Lecture: Rob Holmes—Director of Marketing at vudu, Branding Early Adopter Products	
18	March 23 <sup>rd</sup>	Class Presentations of Brand Ethnographic and Survey Insights	<b>Due:</b> Survey Insights for Brand Audit Ethnographic Insights for Brand Audit
19	March 25 <sup>th</sup>	Guest Lecture: Suzanne Sawyer—CMO of Penn Medicine, Branding Strategy	
20	March 30 <sup>th</sup>	Brand Extensions Lecture	<b>Reading:</b> Should You Take Your Brand To Where The Action Is? Extend Profits, Not Product Lines Brand Versus Private Labels: Fighting to Win
21	April 1 <sup>st</sup>	Nivea Case	<b>Prepare:</b> Nivea Case
22	April 6 <sup>th</sup>	Brand Relevance Lecture	<b>Reading:</b> The Brand Relationship Spectrum
23	April 8 <sup>th</sup>	Guest Lecture: Sam Mogilner—Account Director at GroupM ESP (Entertainment, Sports & Cause Partnerships), Strategic Brand Alliances	
24	April 13 <sup>th</sup>	In class consulting for Brand Audit Project	
25	April 15 <sup>th</sup>	Class Summary	<b>Reading:</b> The Brand Report Card
26	April 20 <sup>th</sup>	Brand Audit Project Presentations	<b>Due:</b> All groups' Brand Audit written report
27	April 22 <sup>nd</sup>	Brand Audit Project Presentations	
28	April 27 <sup>th</sup>	Brand Audit Project Presentations	

