



## Marketing (MKTG) 711 – Sections 001 and 002 **CUSTOMER ANALYSIS**

*Class Period:*

Section 001 – T/Th –10:30 am 12:00 pm JMHH 350  
Section 002 – T/Th –1:30 pm 3:00 pm JMHH 360

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### **GENERAL COURSE INFORMATION**

Professor:	Americus Reed II
Office:	764 Jon M. Huntsman Hall
Email:	<a href="mailto:amreed@wharton.upenn.edu">amreed@wharton.upenn.edu</a> Web: <a href="http://americusreed.com/">http://americusreed.com/</a>
Office Telephone:	215-898-0651
Office Hours:	Tuesday: 3:00 – 5:00pm Thursday: 4:30 – 6:00pm Or by Appointment
Emergency Telephone:	Provided in Class
Course Admin:	Provided in Class
Web-site:	Info about *Canvas Website Provided in Class
Text(s):	No required Text Book—I will provide handouts and readings

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### **THE COURSE IS DIVIDED INTO FOUR SECTIONS (STPM) Segmentation, Targeting, Positioning and Messaging**

Part I: **Segmentation**—*Building a Customer Profile*

Part II: **Targeting**—*Gathering Information about your Chosen Segment*

Part III: **Positioning**—*Putting Product into Consumer Minds*

Part IV: **Messaging**—*Talking to your Customers*

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By exploring and discussing these critical components of marketing, we formulate a strategic roadmap, a customer analysis “play book” of sorts. As the theoretical concepts “settle in,” we substantiate them by executing a specific application and corresponding analytical tool. The application may be a case, guest speaker, or even data simulation exercise, but regardless, the purpose is to actually “see” these concepts come to life in the context of what is often a “messy real world.”

This course is built around the mantra of “learning by doing.” I don’t believe in the concept of mid-term and final exams, tests or quizzes. So I won’t waste your time cramming useless information into short term memory for the ultimate purpose of a one-day core dump. Rather, the approach that I have adopted is to create a structure (STPM), and within that structure, iterate from theory to practice. And apply the concepts to the real world.

**GRADING:**

Your course grade will be determined as follows. Each component of your grade is explained in greater detail on the next page.

<b>COURSE COMPONENT</b>	<b>Points</b>	<b>TOTAL POINTS</b>
<b>CLASS PARTICIPATION</b>		50 Points
<u><b>Attendance and Contributions to Class discussion</b></u>	50	
<u><b>Class Exercises</b></u>		15 Points
Pre-Class Questionnaire	3	
Mid-Class Questionnaire	3	
End-Class Questionnaire	3	
Memory Exercise	3	
VALS Exercise	3	
* <u><b>Guest Speaker Engagement</b></u>		30 Points
Guest Speaker #1	5	
Guest Speaker #2	5	
Guest Speaker #3	5	
Guest Speaker #4	5	
Guest Speaker #5	5	
Guest Speaker #6	5	
Guest Speaker #7	5	
* <u><b>Quantitative Analysis Tools</b></u>		30 Points
*Lab #1	10	
*Lab #2	10	
*Lab #3	10	
*Lab #4	10	
(⊥) <b>GROUP PROJECT</b>		40 Points
Managerial Summary	10	
Power Point Slide Deck	20	
<b>TOTAL:</b>		<b>165 Points</b>

(⊥) Students will learn HOW TO address each area using a specific managerial framework and an analytical tool. Cumulative learning will be applied to a Group Project Analysis that touches on one or more of the areas of (STPM) for a specific company.

**NOTE on class content:** Some of the analytics (e.g., Logistic Regression, Cluster analysis, ANOVA, Chi-Square analysis) partially overlap with statistical content from other marketing courses (e.g., Marketing Research), but our emphasis will be on how to use them to understand customers better. This is a drill down course that builds on concepts from the core marketing intro classes.

**NOTE on class decorum:** Bring your name plates to class every day (so I can learn who you are!) Do NOT bring lap tops, tablets, iPads, iPods, etc. into class. During class, you have my 100% attention; during class I want 100% of yours. Cell phones are fine, but you will lose class participation points if you use your mobile device to surf and answer email, etc.

**Note:** This syllabus is subject to change

\* **NOTE:** *The lowest score of these two components will be dropped.*

## **GRADING NOTES (Please Read Carefully):**

### **COURSE COMPONENT**

#### **CLASS PARTICIPATION:**

**Attendance and Contributions to Class discussion:** I along with help from the course TA will rate your contribution to class based on your attendance, the quality of your comments during class discussions, your level of engagement with the course materials in and out of class. **Do NOT bring lap tops, tablets, iPads, iPods, etc. into class. During class, you have my 100% attention; during class I want 100% of yours. Cell phones are fine, but you will lose class participation points if you use your mobile device to surf and answer email, etc.**

**Class Exercises:** Throughout the semester, as part of class engagement and class demonstrations, you will be asked to complete 5 total class exercises. These range from simple very short questionnaires that demonstrate concepts in class, to online exercises that bring concepts alive.

**Guest Speaker Engagement:** I will have excellent outsiders from Industry visit our class and present on how they approach concepts (that we discuss in class) in the real world. Students will also earn class participation points by attending all guest presentations, getting involved in the discussion (by asking and responding to insightful questions) and evaluating the speakers in an online post presentation questionnaire I will provide. *You can miss one speaker engagement—the lowest score will be dropped.*

**Quantitative Analysis Tools:** As part of the course, and the group project, I will teach you four quantitative customer analysis tools to use. On these days, we will be in a lab and complete the analysis. You will turn in four short lab write ups based on these analyses, demonstrating to me that you know how to apply and interpret the method. *The lowest score of these lab assignments will be dropped.*

#### **GROUP PROJECT:**

The group project is the culmination of the class to see if you truly have grasped the class concepts in total, and if you can apply them to a real world situation and real world company. The group project is designed to provide a hands-on opportunity to collaborate on a real world branding / consumer / marketing situation. Your team will be graded by the Marketing executives of the group project. Team members typically receive the same grade, although ***adjustments will be made if necessary based on instructor and peer assessment of contributions to team work.*** Your work will be submitted to the marketing executives for review and assessment.

## MKTG 711: DETAILED CALENDAR OF COURSE TOPICS

Day	Date	Topic
Thursday	January 14	1. Introduction to the course

<b>PART I: Segmentation—Building a Customer Profile</b>		
Tuesday	January 19	2. Demographic Segmentation
Thursday	January 21	3. Introduction to the Group Project
Tuesday	January 26	4. Lab Day One: ANALYTICAL TOOL analyze demographic segments
Thursday	January 28	5. Consumer Identity and the Self-Concept
Tuesday	February 2	6. Guest Speaker: Hershey's Creating Personas
Thursday	February 4	7. Psychographic Segmentation
Tuesday	February 9	8. Lab Day Two: ANALYTICAL TOOL analyze psychographic segments

<b>PART II: Targeting—Gathering Information about your segment(s)</b>		
Thursday	February 11	9. Market Intelligence: Making Sense of Data using Models
Tuesday	February 16	10. Guest Speaker: Market Research in the Real World
Thursday	February 18	11. Measuring your Customer's Attitudes
Tuesday	February 23	12. Lab Day Three: ANALYTICAL TOOL to refine targeting strategy
Thursday	February 25	13. Case Analysis: Windows Phone Code Name Mango
Tuesday	March 1	14. Midterm Progress Report

<b>PART III: Positioning—Putting Product into Consumer Minds</b>		
Thursday	March 3	15. Guest Speaker: Madoff Studios Creating Positioning
Tuesday	March 8	16. NO Class – Spring Break
Thursday	March 10	17. NO Class – Spring Break
Tuesday	March 15	18. Exposure, Perception and Attention
Thursday	March 17	19. Guest Speaker: NIKE and Product Positioning
Tuesday	March 22	20. Memory and Retrieval
Thursday	March 24	21. Guest Speaker: Fizz and Word of Mouth to Enhance Memory

<b>PART IV: Messaging—Talking to your Customers</b>		
Tuesday	March 29	22. Using Rational, Emotional and Social Appeals
Thursday	March 31	23. Lab Day Four: ANALYTICAL TOOL to assess advertising campaigns
Tuesday	April 5	24. Guest Speaker: Using Emotional Advertising to Differentiate
Thursday	April 7	25. LIVE Case Day: Topic Messaging
Tuesday	April 12	26. Guest Speaker: Consumer Crisis Management
Thursday	April 14	27. Prepare for Group Project Presentations
Tuesday	April 19	28. Prepare for Group Project Presentations
Thursday	April 21	29. Prepare for Group Project Presentations
Tuesday	April 26	30. Course Wrap up and Reflections

(\* ) FINAL PRESETATIONS: April 28<sup>th</sup> and April 29<sup>th</sup>