

MKTG 277

MKTG 277 Marketing Strategy

Fall 2020 | MW 10:30 a.m. to 11:50 a.m. | **TBD**

Instructor: Thomas S. Robertson, 769 JMH
Email: robertson@wharton.upenn.edu
Office Hours: M 4-5:30 p.m. *or by appointment*

TA: Stefana Covalciuc
Email: cstefana@wharton.upenn.edu

TA: Lauren Vickers
Email: ltv@wharton.upenn.edu

Course Coordinator: Michele Anna Klekotka
Email: klekotka@wharton.upenn.edu

Description

This course views marketing as both a specialized management responsibility and an orientation of the firm that helps create, capture, and sustain customer value. The course develops knowledge and skills in the application of advanced marketing frameworks, concepts, and methods for making strategic choices at different stages of the product life cycle. This course is biased toward B-to-C marketing.

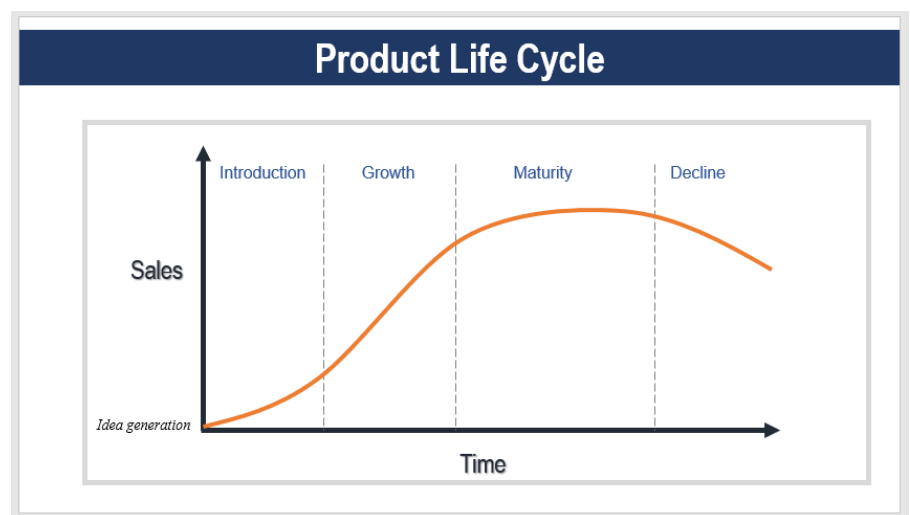
Objective

This course will help you develop knowledge and skills in the creative and rigorous application of marketing strategy concepts and methods in order to enhance long run value for business entities in both the for-profit and not for profit sectors of the economy.

Goals

By the end of the course, you should have gained an understanding of contemporary challenges in marketing management across the product life cycle and developed a conceptual and capability base for:

1. identifying market gaps via customer journey analysis
2. pursuing organic growth via innovation and market development;
3. launching new products and achieving rapid takeoff;
4. planning migration strategies for continued growth;
5. defending products and markets in a commodity environment;
6. managing decline and demise



Grading and Pedagogy

This course assumes a high degree of involvement and interaction. The learning methods are a combination of lectures, cases, debates, guest speakers, and a team-based customer experience project.

Grading will be in accordance with Wharton policies. No individual extensions will be given for class assignments. The only extensions granted (if any) will be to the entire class.

Seating

Students are asked to occupy the same assigned seat for each class session.

Office Hours

Should you have any questions or concerns about the class, please see me or our TAs (Lauren or TBD).

I have found that a fixed time for office hours does not work very well for many members of class. Nevertheless, I am available Mondays in my office from 4-5:30 p.m. However, please feel free to email Michele Anna Klekotka (klekotka@wharton.upenn.edu) to arrange a mutually convenient time to meet on an alternative day. Lauren and TBD will not maintain regular office hours but can be reached via email to arrange a meeting. They will also schedule coffee chats throughout the semester

Faculty-Student Meal Program

You will be invited to sign up for an informal meal with Prof. Robertson and classmates as part of the Wharton Student-Faculty Meals Program. Dates will be announced through Canvas where you also can confirm your attendance.

Course Materials

A course pack will be available through Study.net which will include the weekly case studies and assigned readings.

Student Referred Reading Material

Please post interesting articles that relate to the course directly to Canvas for all of us to read. This will count as part of your participation grade.

Do not take the course if you cannot sit for the midterm as scheduled on Monday, Nov. 23rd.

Assessment

Individual Level (65%):

• Midterm examination	30%
• Written case analysis	20%
• Attendance, participation and postings	10%
• Store Visit Assignment	5%

Team Level (35%):

• "Shark Tank" Project	25%
• Team Debate	5%
• Intragroup evaluation of team members	5%

Classroom Commitment

1. You are expected to treat fellow students with respect and are expected to arrive for class on-time. Avoid leaving the room while class is in session. This is disruptive and suggests a lack of commitment.
2. Attendance is of paramount importance. Students will be allowed two (2) absences for the semester. Absences beyond 2 will affect your final grade by 0.5 points for each absence. If you will miss class due to a religious observance, you must register this in advance.
3. Plagiarized work will result in failure of the course. Please refer to Penn's Plagiarism Policy: http://gethelp.library.upenn.edu/PORT/documentation/plagiarism_policy.html

Electronics in the Classroom

1. Students (and the professor) find the presence of mobile phones, laptops and tablets to be distracting—whether because having these devices in class makes it more likely that students will engage in activities such as texting or online social networking, or because students find themselves distracted by their peers' use of devices to type, message, play games or surf the internet. For this reason, **the use of mobile phones, laptops, tablets, etc. during class is not permitted.** The necessity of classroom interaction in this course negates the usefulness of laptops as a note-taking device.
2. If you must keep a phone on by reason of a personal emergency, you must inform Prof. Robertson before class.

Detailed Schedule – MKTG 277

Session	Day	Date	Topic
Idea Generation	Wednesday	9/2/20	Course Overview Advance Preparation Question for Sept. 9th: What would you deem to be three emerging trends relevant to Marketing Strategy? Provide a sentence on each to explain. We will summarize across class members and discuss in class on Wednesday, Sept. 9 th UPLOAD YOUR RESPONSE TO CANVAS BY 3 PM, TUES., SEPT. 8th
	Monday	9/7/20	No Class. Have a safe and happy Labor Day!
	Wednesday	9/9/20	Trends and Opportunities Academic Readings: "How Smart, Connected Products Are Transforming Competition," "The Age of Continuous Connection" In-Class: Team Assignments will be revealed in class.
	Monday	9/14/20	Entrepreneurial Marketing Guest Lecturer: Justin Silver, Aavrani
	Wednesday	9/16/20	Designing Strategies for the Future Academic Readings: "Blue Ocean Strategy," "Cover Feature: Our Lives in 2033," and "Meeting the Challenge of Disruptive Change" In-Class: Take a position on utopia vs. dystopia. Come to class prepared to justify.
Market Introduction	Monday	9/21/20	Marketing a New Concept Guest Lecturer: TBD
	Wednesday	9/23/20	Launch and Lifecycle Management Academic Readings: "Winning the Take Off Battle" Assignment: Shark Tank Team project abstracts are due. Indicate the experience category you selected and give a brief (50-75-word) synopsis of project process. (Upload to Canvas by 10:30 a.m.)
	Monday	9/28/20	Trends and Opportunities Academic Reading: "The end of car ownership" Case Study: Google Car Watch Video: https://waymo.com/
	Wednesday	9/30/20 Global Forum San Fran	The Future of Retail Guest Speakers: Oliver Chen, Cowen and Christine Hunsicker, CaaStle
Growth	Monday	10/5/20	Market Defense Academic Readings: "Incumbent Defense Strategies"
	Wednesday	10/7/20	Luxury and Fashion Academic Readings: "Anti-laws of Marketing," and "Conspicuous Leisure" In-Class: Defend or refute the "anti-laws of marketing."
	Monday	10/12/20	Competitive Positioning and Challenge Case Study: Ryanair Strategic Positioning (A)
	Wednesday	10/14/20	Disruption Case Study: "Dollar Shave Club" Assignment: Write Case Analysis (Upload to Canvas by 10:30 a.m.)
	Monday	10/19/20	Brand Management
Growth	Wednesday	10/21/20 (midpoint) Carlyle NYC	Shared Consumption Guest Lecturer: Beth Kaplan "How I built this podcast" episode with Susan Tynan on Framebridge. https://www.forbes.com/sites/richardkestenbaum/2019/09/15/consumers-want-retailers-to-make-it-easy-why-is-that-so-hard/
	Monday	10/26/20	When Sales Stall Case Study: Rebranding Godiva: The Yildiz Strategy

	Wednesday	10/28/20	<p>**THIS SESSION WAS INSTEAD USED TO PREP FOR FERNANDO**</p> <p>The Customer Experience Case Study: Eataly: Reimagining the Grocery Store (NOT USED IN 2019) Register here for the simulation: https://hbsp.harvard.edu/import/649882</p>
Maturity & Turnaround (or Decline)	Monday	11/2/20	<p>Brand Turnaround Guest Lecturer: Fernando Machado, CMO, Burger King Case Study: Burger King Teams 1 and 2: Presentations to Mr. Machado Assignment: Teams 1 and 2: Upload your presentation to Canvas by 9 a.m.</p>
	Wednesday	11/4/20	<p>Segmentation & Positioning. Academic Reading: "Reality Bites Back," "The Consumers of the Future: Influence vs. Affluence," "The State of Gen Z" found here: https://www.businessinsider.com/gen-z-politics-tech-use-identity-2019-7</p>
	Monday	11/9/20	<p>In-Class Debate: Teams 3-4 and 5-6 Assignment: Teams 3-10: Upload your presentation to Canvas by 9 a.m. on Nov. 9th regardless of when you are debating.</p>
	Wednesday	11/11/20	<p>In-Class Debate: Teams 7-8 and 9-10</p>
	Monday	11/16/20	<p>Social Media Academic Reading: "Digital Marketing" Guest Lecturer: Linz Shelton, Michael Kors Assignment: ALL TEAMS must submit a draft of their Shark Tank slides to Canvas by 10:30 a.m. on Nov. 16th.</p> <p>Teams should schedule meetings via Michele (kleotka@wharton.upenn.edu) with Prof. Robertson, TBD, or Lauren</p>
	Wednesday	11/18/20	<p>The Consumer Journey Academic Reading: "Understanding Customer Experience Throughout the Customer Journey" Assignment: Store Visit. See instructions in Syllabus. (Upload to Canvas by 9 a.m.)</p>
	Monday	11/23/20	<p>Midterm Examination Administered in Computer Lab TBD</p>
	Wednesday	11/25/20	<p>No Class. Happy Thanksgiving!</p>
	Monday	11/30/20	<p>Omnichannel and Popups Academic Readings: "Pop-Ups, Ephemerality and Consumer Experience: The Centrality of Buzz," and "Liquid Consumption" View Video: Scott Galloway The Retailer Growing Faster than Amazon. https://www.youtube.com/watch?v=KwiI6to6zXM</p>
	Wednesday	12/2/20	<p>Demise Case Study: JC Penney (NOT USED IN 2019; HAMISH TAYLOR INSTEAD)</p>
	Monday	12/7/20	<p>Shark Tank Presentations Assignment: *ENTIRE CLASS* ALL TEAMS must submit their slides to Canvas by 9 a.m. on Dec. 2nd regardless of when you are presenting.</p>
	Wednesday	12/9/20 Last day of class is Thurs., Dec. 10 th	<p>Shark Tank Presentations (continued)</p>

About the Professor and Teaching Assistants

THOMAS S. ROBERTSON. Joshua J. Harris Professor; Professor of Marketing; Academic Director, Baker Retailing Center; Executive Director, Wharton-INSEAD Alliance; Former Dean

Dr. Robertson is an expert in marketing strategy and competitive behavior, his recent research has focused on ephemerality in retailing and the forecasting of retail sales. Dr. Robertson is author, co-author or editor of a dozen books and almost 100 scholarly articles and book chapters. He has won numerous awards for his scholarship and has lectured widely in North and Central America, Europe, Asia, Australia, and Africa.

In 2014 Dr. Robertson completed a seven-year term as Dean of the Wharton School. In this role he raised substantial financial resources for the School, while championing global engagement, a strong culture of innovation, and business as a force for good. Under his leadership Wharton implemented a new MBA curriculum, a new initiative in public policy, creation of modular courses which run in ten countries, a research and teaching campus in Beijing, a commitment to lifelong learning for Wharton alumni, and the design of a portfolio of online courses reaching over two million participants worldwide.

Prior to his Wharton deanship, Dr. Robertson held posts at Emory University. From 1998 to 2004 he was Dean of Emory's Goizueta Business School. He then served as founding Executive Faculty Director of the Institute for Developing Nations, a joint-venture research initiative with The Carter Center and President Jimmy Carter. From 1994 to 1998, he served as Deputy Dean of the London Business School in charge of the School's portfolio of degree and non-degree programs. In addition to his appointments at Wharton, Emory and London Business School, Dr. Robertson has held faculty positions at UCLA's Anderson School and Harvard Business School.

Dr. Robertson is an active board member in the university and corporate domains. He serves on the Advisory Boards of the Sorbonne and Indian School of Business, and is a member of the Board of Directors of the Carlyle Group. Formerly, he was a director of CRA International, a trustee of Singapore Management University, and served on the Advisory Boards of Tsinghua University and Guanghua School of Management (Peking University).

Stefana Covalciuc, Teaching Assistant, MBA Candidate

[Insert BIO]

Lauren Vickers, Teaching Assistant, MBA Candidate

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About the Guest Lecturers. **These Lecturers are Tentative as of Mar. 2nd.**

Guest speakers will present lectures that complement our discussions. They have been chosen for their expertise in particular aspects of marketing strategy. All are engaging speakers who will add their own unique perspective on the area of marketing strategy.

Justin Silver. Founder and President, aavrani

Justin is the Founder and President of aavrani, the Indian inspired premium skincare company which was launched in June 2018. aavrani is reshaping the skincare market by delivering powerful, all natural, clean beauty solutions to women in the US. Justin also received his MBA at Wharton where he was the William & Anandi Ebsworth Pratap Fellow and a Student Life Fellow. Prior to Wharton, he was a Private Equity Senior Associate for both Beechwood Capital and TA Associates. Justin also worked as an M&A Investment Banking Analyst for Credit Suisse. He graduated from NYU Stern with a Bachelor of Science in Management and Finance.

Oliver Chen, CFA, Cowen and Company

Oliver Chen has joined Cowen and Company's Equity Research department as a Managing Director and Senior Equity Research Analyst. He covers over 30 stocks in the Retail & Luxury Sectors. He is a graduate of Georgetown University, The Wharton School at the University of Pennsylvania and is a CFA Charterholder. He also serves on the PhD Retail Research Review committee at the Wharton School's Jay H. Baker Retailing Center. Mr. Chen was recognized in the Wharton School's "40 Under 40" brightest stars alumni list in 2017. Most recently, Mr. Chen was recognized on the 2018 and 2017 Institutional Investor All-America Research team as a top analyst in the retailing/department stores & specialty softlines sector. Mr. Chen was also selected as a preeminent retail influencer as he was named to the National Retail Federation (NRF) Foundation's "2019 List of People Shaping Retail's Future." Considered an "industry expert," Mr. Chen frequently appears as a speaker/panelist at key industry events.

Christine Hunsicker, Founder and CEO of CaaStle,

CaaStle is a revolutionary B2B technology platform empowering retailers and fashion brands to strategically participate in a new sharing economy. The CaaStle technology powers iconic brands such Bloomingdales, Banana Republic, Ann Taylor, LOFT, Express, Rebecca Taylor, Vince, and American Eagle. CaaStle also operates the popular women's brand, Gwynnie Bee.

Christine attended Princeton University and graduated in 1999. After starting her career in strategic finance, she became the President and COO of the startup Right Media. Right Media transformed the ad exchange industry, an accomplishment that led Yahoo! to purchase the company for \$850,000,000 in 2007. She then went on to become the COO of Drop.io, and sold the company to Facebook in 2010. With an outstanding pedigree of leading successful startups, Christine has been recognized in Inc. Magazine's Most Impressive Women Entrepreneurs, Top 100 Female Founders, Crain's 40 Under 40 annual power list as well as the National Retail Federation's List of People Shaping Retail's Future. She also starred as an investor in *Project Runway: Fashion Start-Up* on the Lifetime network in 2014.

Beth Kaplan. Former President and COO; Member, Rent the Runway Board of Directors

Ms. Kaplan is also board member of Things Remembered and Sleepys, and previously held seats on the boards of General Nutrition Centers, Blackboard, Minute Clinic, Disney Stores and The First Years. She served, through 2011, as the president and chief marketing officer and merchandising officer of General Nutrition Centers. Ms. Kaplan was part of the team that successfully took the company public in 2011. Prior to that she was executive vice president of merchandising at Bath & Body Works; senior executive vice president of marketing & merchandising at Rite Aid Drugstores; and vice president of the cosmetics division of Procter & Gamble. In 1999, Ms. Kaplan was named Drugstore Marketer of the Year and was included in the "Advertising Age Top 10 Women to Watch." She holds an undergraduate degree in economics, summa cum laude, and an M.B.A. from the Wharton School at the University of Pennsylvania.

Fernando Machado, CMO, Burger King

Fernando is a global marketer with a passion for growing brands and businesses. With more than 160 Lions in Cannes (8 GPs, including 2 Titanium GPs), 16 D&AD Yellow Pencils, and 2 Grand Effies in North America, Fernando is known for pushing the creative boundaries to drive business growth.

Currently as Global CMO at Burger King, Fernando's focus is infusing the brand with purpose, modernizing the design, improving and inspiring the organization around brand development. Under Fernando's leadership, Burger King became Client of the Year at the D&AD in 2016, Creative Marketer of the Year in Cannes 2017, Client of the Year at the One Show 2018, Advertiser of the Year at the Clio Awards 2018, and Creative Brand of the Year in Cannes 2019.

Prior to joining BK, Fernando worked for 18 years at Unilever. Starting as an intern, he moved up the ranks working different product categories and brands, including Dove where he led the groundbreaking "Beauty Sketches" (Titanium GP in 2013).

Fernando was recognized by Adweek as Grand Brand Genius (2013 and 2018 - only person to ever win twice), by Business Insider as top 10 people transforming advertising, by the AD Club of NY as Marketer of the Year (2017), by Business Insider as top 10 most innovative CMOs (2017, 2018 and #1 in 2019), by AdAge as top 50 most creative people in the business (2017), by Forbes as Top 100 Most Creative Minds in Business and by Fast Company as Top 100 Most Creative People in Business (2019).

Linz Shelton. Global Social Media Director, Michael Kors

Experienced digital and social media strategist with a focus on fashion retail and ecommerce. Strong global experience, managing international cross-functional teams. Entrepreneurial background: founded, built, and sold a global fashion start-up. Specialties: social media, digital marketing, brand strategy, social media marketing and advertising, luxury marketing, product development, launching and cultivating partnerships, experience innovation. Received MBA from New York University's Stern School of Business specializing in Digital Marketing and Luxury Retail.

Shark Tank Investors

Andy Newcomb, Managing Partner, MissionOG

Andy is co-founder and Managing Partner at MissionOG where he focuses on investments in financial services & payments, data platforms and software businesses. Current and prior investments include Behalf, BridgeFT, DemystData, FactorTrust, GAN Integrity, Solovis, and Syncapay. Previously, Andy co-founded Relay Network, a mobile communications company; was Group Head of Sales and Corporate Development for Citi Prepaid Services; and was a founding team member of Ecount (acquired by Citi), a pioneer and leader in the prepaid card industry. Preceding Ecount, Andy spent eight years in investment management, most recently as a portfolio manager with Chartwell Investment Partners, where upon his departure his teams had achieved top decile and quartile rankings. Andy graduated from Trinity College with a Bachelor of Arts in History.

Sunny Rao. Co-founder and CEO of ZoomIn.com.

ZoomIn is a photo sharing and printing service. Before ZoomIn, Sunny co-founded Half.com, one of the largest sellers of used books, movies and music in the world, where he was Chief Technology Officer. Computerworld named Sunny a Premier 100 IT Leader in its annual ranking of Information Technology leaders. Half.com was acquired by eBay in July 2000 in a transaction valued at over \$350 million. After the acquisition, Sunny remained with eBay to integrate the two companies' technologies. Since leaving eBay in 2003, Sunny has been an active angel investor and advisor in a number of technology start-ups. Prior to Half.com, Sunny spent six years at Infonautics, where he designed and built the Sleuth product line and managed the operations of the Electric Library, a subscription service similar to LexisNexis. He is also part of the India based venture fund—Lightbox Ventures.

Tentative Guest Speakers

Hamish Taylor. Award winning CEO and Inspirational Speaker and Broadcaster

Mr. Taylor's career has taken him from international consumer goods giant Procter & Gamble, consultancy firm Price Waterhouse and British Airways to become CEO of the channel tunnel railway Eurostar, and then Sainsbury's Bank. In all cases he left behind a record of significant business growth triggered by a willingness to challenge the normal way of doing things – so much so that his advice and assistance is now sought by organizations all over the world in many different industries. The Inspired Leaders Network gave him the title MasterThief based on his record of transferring ideas between sectors. Regularly featured in broadcast media, today Hamish acts as an adviser to some of the world's largest companies (and even Governments) assisting with innovation projects, customer focus and/or people leadership

Nicolas Topiol. CEO, Christian Lacroix.

Nicolas Topiol began his career as a bond trader and a treasurer for the French subsidiary of the Standard Chartered Bank. Subsequent to obtaining his MBA from the Wharton School, he joined the private equity and mergers and acquisition departments at Société Générale before joining the French offices of Apax Partners. He moved to the United States in 1994 to pursue his private equity expertise in investing and developing multiple ventures and joined with the Family office of the Falic Family in 2002 to establish duty free retail and distribution operations in Central and South America, the acquisition from LVMH of Hard Candy, Urban Decay Cosmetics, and the House of Christian Lacroix becoming its CEO. Throughout his career, Nicolas developed international expertise in various industries, as well as in acquisitions and direct investments in private companies and has further complemented this expertise with hands-on operational work in the United States and Europe.

Case Studies and Academic Readings

Case Studies

1. "Google Car" (HBS 9-614-022. Rev. 3/9/15)
2. "Ryanair Strategic Positioning (A): July 2013" (IMD-7-1872)
3. "Rebranding Godiva: The Yildiz Strategy" (HBS 9-515-059. Rev. 1/15/15)
4. "Eataly: Reimagining the Grocery Store" (HBS 515708-HTM-ENG) Go here to register for the simulation:
<http://cb.hbsp.harvard.edu/cbmp/access/65629927>
5. "Can 3G Capital Make Burger King Cool Again?" (INSEAD 518-0053-1)
6. "Dollar Shave Club" (LBS, CS-18-017) **WRITTEN CASE ANALYSIS**
7. "JC Penney" (Baker Retailing Center Case Study)

9. Veblen, Thorstein (2008). "Conspicuous Leisure," *The Theory of the Leisure Class*.
10. Gatignon, Hubert, Thomas S. Robertson and Adam J. Fein (1997). "Incumbent defense strategies against new product entry," *International Journal of Research in Marketing*.
11. "What Gen Z Wants," (2019), BloombergBusinessweek.
12. Siggelkow and Terwiesch (2019). "The Age of Continuous Connection," *Harvard Business Review*.
13. ATKearney Global Future Consumer Study (2017). "The consumers of the future: Influence vs. affluence"
14. Gupta, Sunil and Joseph Davin (2015), "Digital Marketing," *Harvard Business School Publishing*, July 31.
15. *Business Insider* (2019) "The State of Gen Z"
<https://www.businessinsider.com/gen-z-politics-tech-use-identity-2019-7>

Readings

1. Porter, Michael E., and James E. Heppelmann (2014). "How smart, connected products are transforming competition," *Harvard Business Review*.
2. Kim, W. Chan and Renee Mauborgne (2007). "Blue Ocean Strategy," *Harvard Business Review*.
3. Newton, Rich. Cover Feature: "Our Lives in 2033," *British Airways Business Life*.
4. Christensen, Clayton and Michael Overdorf (2000). "Meeting the challenge of disruptive change," *Harvard Business Review*, March-April.
5. Robertson, Thomas, Hubert Gatignon and Ludovica Cesareo (2018). "Pop-Ups, Ephemerality and Consumer Experience: The Centrality of Buzz," *Journal of the Association for Consumer Research*, (3)3.
6. Bardhi, Fleura and Giana M. Eckhardt (2017). "Liquid Consumption," *Journal of Consumer Research*, (44), 582-597.
7. Kuester, Sabine and Thomas Robertson (2005). "Winning the take-off battle" *European Business Forum*, Winter, Issue 20.
8. Kapferer, Jean-Noel, and Vincent Bastien (2012). "Anti-laws of marketing," *The Luxury Strategy*.

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Due November 18th | The Consumer Journey, Store Visits

Directions:

1. Visit at least three stores in Philadelphia or elsewhere in either: 1) the beauty space (e.g., Sephora, Ulta, Blue Mercury, department store cosmetics counter or, 2) the department store space/big box space; i.e., Walmart, Kohl's, Target, Macy's. Take pictures to describe your impression and feelings;
2. At the beginning of class, we will ask classmates to show pictures of what they experienced;
3. Submit a two-page summary of what insights you gained—good and bad. Use bullets to list five (5) positive impressions followed by five (5) negative impressions. Then provide a set of generalizations as to how these stores could improve the customer experience.

Due by **9 a.m.** on Nov. 18th. Upload to Canvas

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Case Study Discussion Questions

Google Car

1. Is the Google Car project a worthwhile investment of its resources?
2. Can Google compete against established auto manufacturers working on self-driving technology, or should it establish a partnership?
3. Should Google manufacture its own vehicles or license its self-driving software?

Ryanair Strategic Positioning (A)

1. What is Ryanair's value proposition?
2. How bad is Ryanair's service?
3. Is it perception or reality?
4. Are customer needs really changing?
5. Should Ryanair expand to the business traveler segment and improve its service?

Rebranding Godiva

1. What is your model of consumer behavior in the chocolate market?
2. How is this marketing segmented?
3. Contrast the Lindt strategy to the Godiva strategy.
4. What brand positioning should Godiva pursue?
5. What channel strategy do you recommend?

Eataly. Visit here to register for the simulation: <http://cb.hbsp.harvard.edu/cbmp/access/65629927>

1. Describe the customer experience. Is the Eataly model scalable?
2. Can Eataly maintain its profitability?
3. Will the European low-price retailers (such as Aldi and Lidi) continue to take share?
4. Will online retailers (such as Ocado and Peapod) continue to take share?
5. Contrast the Eataly customer experience with and Aldi and a Peapod.

Burger King (Teams 1 and 2 will present ideas to Mr. Machado)

1. Which of the five positioning options would you choose?
2. How should marketing dollars be allocated among TV commercials, digital campaigns and PR and brand design/packaging/logo?
3. **Teams 1 and 2 Assignment:** Design a campaign or activation concept
 - a. Prepare a presentation video (max. 2 mins) or 5-page presentation showing your solution
 - b. We will ask Teams 1 and 2 to present to CMO Fernando Machado. He will critique and then update us on what's happening at Burger King

Dollar Shave Club

1. What is Dollar Shave Club's value proposition?
2. What are Gillette's strategic options to defend? What do you recommend and why?

JC Penney

1. What would you identify as the top three issues facing JC Penney when Johnson took over as CEO?
 2. How would you assess Johnson's strategy? What were the strengths, weaknesses and potential mistakes?
 3. What were the main reasons why the new strategy didn't show success while Ron Johnson was CEO?
 4. Everyday low pricing has been successful at other retailers (e.g., Walmart, Costco, Trade Joe's, Aldi). Can it work for Department stores and apparel retailers? If so, under what circumstances?
 5. What can Myron Ullman do now that he is in charge? Which parts of Ron Johnson's strategy should he keep, change and discontinue?
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Team Debate Assignment

Team Responsibilities

Prepare a 5-slide PowerPoint presentation of the arguments supporting your team's position.

Teams 3-10: Upload your presentation to Canvas by 9 a.m.

Teams will be selected to present in class a constructive argument of the team's position and a rebuttal of the opposing team's position. Not all teams will present.

Format

Agree Team Opening Statement	4 mins
Disagree Team Opening Statement	4 mins
Teams Prepare Rebuttal	2 mins
Agree Team Rebuttal	2 mins
Disagree Team Rebuttal	2 mins
Agree and Disagree Teams Field Questions from Class	5 mins
Class Votes a Debate Winner	2 min
Debrief on Topic	3 min

Preparation

You must take the extreme position—*for* or *against*. The most effective debates will formulate compelling arguments related to our course content, provide evidence to support these arguments, and suggest relevant company examples.

Debate Topics

Teams 3 and 4: National brands are dead

Teams 5 and 6: Ownership is dead

Teams 7 and 8: You can create a luxury brand

Teams 9 and 10: It is unfair to offer varying service levels to consumers based on their profitability

Assessment

Prof. Robertson, TAs and Classmates

The assignment will be based on your group's ability to construct and present a compelling argument for your position and to rebut and answer questions about opposing points of view.

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Case Analysis

Directions

1. Analyze the **Dollar Shave Club** case study.
2. Submit the analysis via Canvas before 10:30 a.m. on Wednesday, Oct. 14th;
3. Limit 1000 words (double-spaced paper), plus four (4) *optional and original* exhibits (i.e., not exhibits found in the case study)
4. Any case analysis submitted after the class discussion will be downgraded 20 points.

Structure

- Statement of decision to be made;
- Strategic options considered;
- Recommended decision;
- Justification for decision;
- [Four (4) exhibits maximum (Exhibits are optional and not required)]

Guidelines

- This is not a research paper; it is an analysis of the facts;
- Do not use any outside information when preparing for case discussion;
- Outside sources of information include the library, mass media, the internet and corporate executives for the case in question

Grading Rubric

Topic	Criteria	Points Possible	Score
Problem presentation	Clearly articulates Dollar Shave Club's value proposition and summarizes Gillette's decision to be made	4	
Strategic options	Articulates strategic options and pros/cons of each	5	
Decision and rationale	Clearly elaborates recommended decisions, provides justification through supporting case and course concepts	8	
Presentation	Arguments are coherent and convey depth of analysis; exhibits (if any) support and enhance arguments	3	
	TOTAL	20	

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How to Analyze a Case Study

A case study helps students learn by immersing them in a real-world business scenario where they can act as problem-solvers and decision-makers. The case presents facts about a particular organization. Students are asked to analyze the case by focusing on the most important facts and using this information to determine the opportunities and problems facing that organization. Students are then asked to identify alternative courses of action to deal with the problems they identify. A case study analysis must not merely summarize the case. It should identify key issues and problems, outline and assess alternative courses of action, and draw appropriate conclusions. The case study analysis can be broken down into the following steps:

Identify the most important facts

Read the case several times to become familiar with the information it contains. Pay attention to the information in any accompanying exhibits, tables, or figures. Many case scenarios, as in real life, present a great deal of detailed information. Some of these facts are more relevant than others for problem identification. One can assume the facts and figures in the case are true, but statements, judgments, or decisions made by individuals should be questioned. If key facts and numbers are not available, you can make assumptions, but these assumptions should be reasonable given the situation.

Identify the key issues

Use the facts provided by the case to identify the key issue or issues facing the company. Many cases present multiple issues or problems. Identify the most important and separate them from more trivial issues. State the major problem or challenge facing the company. You should be able to describe the problem or challenge in one or two sentences. You should be able to explain how this problem affects the strategy or performance of the organization. You will need to explain why the problem occurred. Does the problem or challenge facing the company come from a changing environment, new opportunities, a declining market share, or inefficient internal or external business processes?

Specify alternative courses of action

List the courses of action the company can take to solve its problem or meet the challenge it faces. Remember, there is a difference between what an organization "should do" and what that organization actually "can do". Some solutions are too expensive or operationally difficult to implement, and you should avoid solutions that are beyond the organization's resources. Identify the constraints that will limit the solutions available. Is each alternative executable given these constraints?

Evaluate each course of action

Evaluate each alternative using the facts and issues you identified earlier and given the conditions and information available. Identify the costs and benefits of each alternative. Ask yourself "what would be the likely outcome of this course of action? State the risks as well as the rewards associated with each course of action. Is your recommendation feasible from a technical, operational, and financial standpoint? Be sure to state any assumptions on which you have based your decision.

Make a decision

State your choice for the best course of action and provide a detailed explanation of why you made this selection. You may also want to provide an explanation of why other alternatives were not selected. Your final recommendation should flow logically from the rest of your case analysis and should clearly specify what assumptions were used to shape your conclusion. There is often no single "right" answer, and each option is likely to have risks as well as rewards.

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MKTG 277 Marketing Strategy

Customer Experience 'Shark Tank' Team Project Presentation ****UPDATED****

Team Responsibilities

Study the customer experience within one of the following product categories: Health/wellness, sports, wearables, renting/shared economy.

- Primary research. Observe or recount personal experiences in a rigorous and systematic manner.
- Secondary research. Identify sources that might describe the customer experience in your chosen product category (give cites)

Assignment (11 slides only—no written paper)

Slide 1	Map the customer experience for this product category.
Slide 2	Identify the relevant competitors
Slide 3	Identify a gap where customer needs are sub-optimally fulfilled
Slide 4	Propose a new product or service to fill this gap
Slide 5	State your market segment selection and why
Slide 6	State your positioning and draw a perceptual map
Slide 7	State your go-to-market channels
Slide 8	State your communication plan to consumers
Slide 9	List your price and provide your logic
Slide 10	State your revenue objective and how derived
Slide 11	Now critique your own plan as to its potential limitations or unproven assumptions

Submission Process (Draft and Final)

1. **ALL TEAMS**: Submit a **draft** of your slides to Canvas by Monday, Nov. 16th at 9 a.m.
2. **ALL TEAMS**: Submit your **final** presentation by 9 a.m. on Monday, Dec. 7th regardless of which date you are presenting.
3. Present in class for 10-minutes.
Teams 1-5 on Dec. 7th and Teams 6-10 on Dec. 9th
4. Maximum length is 11 readable slides.
5. Not all students on your team are expected to present. Each team can determine who will present their project to the class and Shark Tank entrepreneurs / investors. Students who chose to present will not increase their participation grade, nor will it affect your participation grade if you do not present.

Assessment (25 points)

- 22 points will be subject to an evaluation of the 11 slides as to their, rigor, logic, creativity and use of course concepts. This evaluation will be conducted by Professor Robertson and the TAs.
 - 3 points will depend on the in-class presentations. Your peers will vote as well as the invited entrepreneurs / investors. Their bottom line will be whether they would recommend funding of the idea.
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