

Marketing 778— Strategic Brand Management Spring 2021

T/TH 1:30-2:50pm (001), 3:00-4:20pm (002), Virtual (Zoom links posted to Canvas)

Professor Patti Williams

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**Please Note:

1. **If you are not registered for, and have not attended class (live or via video), by the second class session, you may not take the course.**
2. **Guest Speaker Sessions will be synchronous (live) only. All other sessions will be recorded. If you cannot attend the guest speaker sessions live, you should not take this course this semester.**

Course Overview

Which brands make you happy? What draws you into these brands? How do companies create compelling brand experiences? How could you cultivate a brand that fosters customer engagement? This course takes a customer-centric approach to explore such questions with the goal of identifying the ingredients for building and managing inspired brands.

To bridge theory and practice, the course interweaves lectures, guest speakers, case discussions, and in- and out-of-class exercises. The course culminates in a Brand Audit Project, which provides a systematic way to inventory existing brand assets and develop a forward-looking strategy. The project requires students to select an existing brand for which they conduct their own insights research and to apply their learnings in order to assess the current state of the brand, and to provide recommendations for the brand going forward.

The course objectives are to:

- Provide an appreciation of the role of brands in customer decision making and in creating shareholder value.
- Increase fluency with the core principles underlying a customer-centric approach to brand strategy, and create familiarity with research tools that illuminate the meaning and strength of any particular brand.
- Augment student ability to think creatively and critically about the strategies and tactics involved in building, leveraging, defending and sustaining inspired brands.
- Encourage the application of brand principles to oneself—so as to be aware when building and communicating one's own personal and professional brand.

Course Structure

This course is organized into discrete topics that collectively address the course objectives.

Topic 1: Understanding Brands and Branding

This topic provides a basic understanding of branding: what a brand is, what functions brands serve, and when a brand strategy is relevant for customers and the firm. The cases in this introductory section 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 value to the firm in the form of competitive advantage, increased market share, and reduced risks. The main sessions in this section focus on establishing the key foundations of a strong brand: value proposition, brand personality, brand positioning, and brand relationships—and the distinction between brand image and identity.

Topic 2: Measuring Brands

In order to really understand a brand's meaning and its sources of strength, a critical step is measurement. This section covers traditional and non-traditional tools for measuring brand strength—both qualitative and quantitative methods (e.g., interviews, focus groups, ethnography, surveys and brand valuation methods). Exposure to these tools will be integral in helping students learn from consumers the meaning and strength of a particular brand.

Topic 3: Crafting Brands

This section provides a view into what is involved in the formulation of the brand asset. The most important task in designing the brand is specifying the unique and relevant meaning the brand is to capture. This meaning must then be translated to reflect in the range of brand elements: brand name, logo, slogan, jingle, package design, retail space, online space, and over-arching experience, etc.

Topic 4: Managing Brands

This final section focuses on the challenges that confront brands as they seek growth and relevance over time, and the stewardship, skills, and perspectives that enable sustained brand health. Collectively, the sessions in this section convey the complexity and significance of the long-term task of brand maintenance.

Course Materials

Available via Study.net.

1. Case: *Parfums Cacharel de L'Oreal 1997-2007*
2. Article: *Exploring Brand-Person Relationships: Three Life Histories (Condensed)*
3. Case: *Building Brand Community on the Harley-Davidson Posse Ride*
4. Case: *Samsung Electronics Company: Global Marketing Operations*
5. Case: *Selecting a New Name for Security Capital Pacific Trust*
6. Case: *Naming the Edsel (Condensed)*
7. Case: *Claiborne Asks Web Surfers to Name New Line*
8. Case: *Brand Storytelling at Shinola*
9. Case: *Can 3G Capital Make Burger King Cool Again?*

Additional materials may be posted on Canvas throughout the course.

Course Requirements and Grading

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

➤ Class Participation	15%	
➤ Individual Assignments	45%	
• <i>Brand Relationship Interviews</i>		15%
• <i>Personal Image-Identity Gap Analysis & Positioning Statement</i>		15%
• <i>6-word Personal & Brand Stories</i>		5%
• <i>Brand Purpose Assignment</i>		10%
➤ Brand Audit Project	20%	
➤ Brand Audit Presentation	20%	

Class Participation

Critical to being part of our classroom community is being present in class, both physically and mentally. The course is developed to be an ongoing conversation, and like any meaningful conversation, it requires all parties to be present as much as possible.

Though I typically take attendance in this course, virtual courses and students scattered in many time zones together make attendance more challenging. I will record all class sessions except those in which we welcome a guest speaker. As noted on the first page, if you cannot attend those guest speaker sessions live, you should not take this course. All regular class sessions will be recorded. Those recordings will be made available for students who are unable to attend those classes live.

However, your live attendance in each class session is strongly encouraged and class participation will continue to count for a significant portion of your final grade. There will be many opportunities, both in class and via Canvas, for you to contribute to our discussions.

To allow the rest of the class to benefit from your engagement and thoughtful insights, speak up and become part of the conversation. Grading this aspect of class participation is necessarily subjective. Some of the criteria for evaluating class participation include:

1. Are you prepared? Do your comments reflect evidence of deep case analysis (vs. simply stating case facts)?
2. Are the points you make relevant to our discussion? Do they move our discussion forward (vs. hinder our progress)?
3. Are you an effective communicator? Are your thoughts presented in a concise and convincing fashion?

Focus on quality, NOT quantity.

In addition, you are encouraged to share relevant articles with the class via Canvas, as well as to read and comment productively on those articles posted by your classmates.

Individual Assignments

Four individual assignments are required, several of which are designed to encourage you to apply brand concepts to your own personal brand. See the schedule for due dates and the “Assignment” section of the syllabus for detailed instructions. You will submit these assignments through Canvas prior to the start of the class in which they are due. You should also be prepared to discuss your assignments during class.

Brand Audit Group Project

Students will form teams (between 5 and 7 members) to work on this project. Please take the time to put together a team that will work well together in terms of schedules, skillsets, goals, etc. All groups must be formed, and potential brands identified by the start of the fifth class session.

Your assignment is to select a real brand (new or well-established) and conduct an audit of that brand. Every team must study a different brand, so a pre-approval from me is necessary (see below). A startup that has not yet introduced a product is acceptable, so long as the product definition and potential brand strategies are sufficiently developed to allow for a meaningful audit. I will be happy to work with your team to discuss how the group project might be best adapted to be useful for a startup and to meet course expectations. Feel free to pick a service (e.g., non-profit or for-profit) or product (e.g., consumer, technology, etc.) brand. You can choose a brand that you think is currently very strong or one that you think might be currently under-performing.

The goal of the brand audit is to assess the brand’s sources of equity and suggest ways to improve and leverage that equity. Thus, brand audits are made up of brand inventories (comprehensive summaries of the existing marketing and branding program) and brand exploratories (the result of empirical research), followed by recommendations for brand strategy and strategy implementation.

Brand Inventory: A current, comprehensive profile of how all products and services are marketed, branded and sold by a company.

- Identify all brand elements (logos, symbols, characters, packaging, slogans, trademarks, etc.).
- Discuss and distill the brand’s heritage and historical equity
- Identify the inherent attributes of the product/idea/service (pricing, communications, distribution policies, other relevant marketing activities).
- Profile direct and indirect competitive brands for points of parity and points of differentiation.
- Using all of this, gain an understanding of:
 - What customers’ current perceptions might be based upon
 - Assess the consistency and continuity of marketing program
 - Assess perceptions of line and product extensions by customers and important collaborators
 - Identify brand strengths and weaknesses

Brand Exploratory: An investigation of customer brand knowledge, awareness, associations (strength, favorability, uniqueness), attitudes, preferences, etc. Research activity should be focused on understanding what relevant customers think and feel about the brand and its corresponding product/service category, in order to identify sources of brand equity and opportunities for the future.

- Analysis of prior research studies that might be available (internal, external)
- Analysis of media coverage/interpretation of the brand and product category
- The team's own qualitative research
- The team's own quantitative research

For your qualitative research, conduct (at least) *either* three one-on-one interviews *or* one 6-8 person focus group. For your quantitative research, conduct a survey among a larger number (30+) of relevant customers. Your goal is to learn about the brand associations, brand relationships, sources of equity, etc. possessed by your focal brand.

Using all of this:

- Uncover current knowledge and feelings for the core brand and its critical competitors (existing or emerging)
- Develop a detailed and accurate profile of the brand's image, identity, etc. (platform, associations, stories, etc.)
- Determine depth and breadth of brand awareness, brand image. and necessary points of parity and points of differentiation with respect to critical competitors

The final project will include an in-class presentation to the entire class and a final written report. Both the written and oral components of the project should summarize the key insights from the Brand Inventory and Brand Exploratory. Based upon those insights, make recommendations to best position the brand for the future: Which (if any) new meanings should the brand develop? Which (if any) existing meanings should be strengthened or eliminated? What is the optimal positioning going forward? Identify and elaborate a marketing strategy/program to deliver that recommended positioning. In-class presentations will be short, due to time constraints. Your written report is an opportunity to go beyond, in depth and breadth, what your team is able to cover during the in-class presentation. Your in-class presentation will be evaluated, by all other students in the course as well as by Professor Williams, on several criteria: 1. The extent to which you demonstrate understanding of your target brand; 2. The insightfulness of your qualitative and quantitative research insights; 3. The quality of your team's recommendations to the brand; 4. The overall creativity of your presentation. Be creative! Have some fun!

Progress Reports: Each team will submit progress reports several times throughout the semester. The first progress report should sketch your preliminary understanding of your target brand in terms of salient brand meanings/associations and provide an outline for your qualitative research (see below). This progress report should be no longer than 2 pages, single spaced, 12-point font, 1-inch margins all around.

The second progress report should summarize the most important insights from your qualitative research and sketch your preliminary plan for your quantitative research. This progress report should be no longer than 2 pages, single spaced, 12-point font, 1-inch margins all around.

The purpose of these progress reports is to keep you on track and to provide an opportunity for me to offer feedback and guidance to each team.

Participation Assessment: Each member of the group will be asked to assess the contributions of each group member to the overall brand audit project. I will collect these assessments via an online survey upon completion of the brand audit project. This information will contribute to my final assessment of each member's final grade for the brand audit project.

Final Report: In your team's final report you should convey your understanding of the brand's current status and offer guidance for its future. You will also use the insights from your research to formulate a positioning statement, six-word story, perceptual map, and brand platform (prism, house, etc.) to convey the brand's ideal positioning with respect to its competitors. The final report will use all of this information to identify the sources of brand equity (and missed opportunities), thereby providing the basis for your recommendations going forward.

Final Report Page limitations: 1-page executive summary; 12 additional pages of text (single spaced, 1-inch margins all around; 12-point font); up to 5 pages of appendices/exhibits.

Course Schedule

Session/Date	Topic	Readings	Assignments
#1: Thursday, 1/21/21	What is a Brand? What is Brand Equity?	Course Syllabus	Favorite Brands Worksheet (submit in class)
#2: Tuesday, 1/26/21	Understanding Brands	Case: Parfums Cacharel de L'Oreal 1997-2007	Prepare case for in-class discussion.
#3: Thursday, 1/28/21	Understanding Brands and Brand-Person Relationships	Exploring Brand-Person Relationships: Three Life Histories (Condensed)	
#4: Tuesday, 2/2/21	Brand Community	Case: Building Brand Community on the Harley-Davidson Posse Ride	Prepare case for in-class discussion.
#5: Thursday, 2/4/21	Guest Speaker: <i>Ibraheem Basir (C'07, WG '12), Founder and CEO, A Dozen Cousins</i>		Each group must sign up and submit a listing of 3 potential brands for the Brand Audit Project
#6: Tuesday, 2/9/21	Brand Positioning and Your Personal Brand		
#7: Thursday, 2/11/21	Guest Speaker: <i>Leanne Cutts, Group CMO, HSBC</i>		Brand-Relationship Interview Write-Up
#8: Tuesday, 2/16/20	Measuring Brands		
#9: Thursday, 2/18/21	Guest Speaker: <i>Sebastian Buck, co-founder, enso collaborative</i>		
#10: Tuesday, 2/23/21	Measuring Brands	Case: Samsung Electronics: Global Marketing Operations	Prepare case for in-class discussion.
#11: Thursday, 2/25/21	Guest Speaker: <i>Professor David Reibstein, Nation Brands</i>		Personal Brand: Image Identity Gap Write Up and Personal Positioning
#12: Tuesday, 3/2/21	Crafting Brands: Brand Purpose		Brand Audit Project Progress Report #1

#13: Thursday, 3/4/21	Crafting Brands: Brand Stories		
#14: Tuesday, 3/9/21	Crafting Brands: Brand Stories	Case: Brand Storytelling at Shinola	Prepare case for in-class discussion
#15: Tuesday, 3/16/21	Guest Speaker: <i>Ambika Pai, Chief Strategy Officer, Mekanism</i>		
#16: Thursday, 3/18/21	Guest Speaker: <i>Lesley Crowther, Senior Vice President, Global Marketing, La Mer, Estée Lauder Companies</i>		Six Word Personal Story and Six Word Brand Story
#17: Tuesday, 3/23/21	Crafting Brands: Brand Names	Cases: 1. Selecting a New Name for Security Capital Pacific Trust 2. Naming the Edsel (Condensed) 3. Claiborne Asks Web Surfers to Name New Line	Prepare Security Capital Pacific Trust for in-class discussion. Skim Edsel and Claiborne cases for in-class discussion.
#18: Thursday, 3/25/21	Crafting Brands: Brand Elements		
#19: Thursday, 4/1/21	Guest Speaker: <i>David Rubin (WG '99) CMO, New York Times</i>		Brand Audit Project Progress Report #2
#20: Tuesday, 4/6/21	Crafting/Managing Brands: Brand Platforms & Brand Books		Brand Purpose Analysis
#21: Thursday, 4/8/21	Guest Speaker: <i>Marisa Thalberg, EVP, Chief Brand and Marketing Officer, Lowe's Companies, Inc.</i>		
#22: Tuesday, 4/13/21	Managing Brands: Brand Experiences		
#23: Thursday, 4/15/21	Guest Speaker: <i>Gopi Kallayil (WG '98) Chief Evangelist, Digital Transformation & Strategy, Google</i>		

#24: Tuesday, 4/20/21	Managing Brands		
#25: Thursday, 4/22/21	Managing Brands	Case: Can 3G Capital Make Burger King Cool Again	Prepare case for in-class discussion.
#26: Tuesday, 4/27/21	Brand Audit Project Presentations Part 1		All Brand Audit Presentations
#27: Thursday, 4/29/21	Brand Audit Project Presentations Part 2		All Brand Audit Written Reports

Name: _____

Loved/Hated Brands Worksheet

Complete this sheet and upload it to Canvas. Be prepared to share your responses during the first class session.

1. What is a brand that you love? Why?

Brand Name	Why do you love this brand?
1.	
2.	
3.	

2. What is one brand that you hate? Why?

Brand Name	Why do you hate this brand?

Preparation Questions for Case Analyses

Below are questions to guide your preparation for the case studies we will discuss in class. Note that you do not have to turn in answers to these questions; they are merely guidelines or starting points for your own analysis. The questions are meant to help you focus on the main problems identified in the case and to give you a sense of the issues and themes we will discuss in class.

Parfums Cacharel de L'Oréal 1997-2007: Decoding and Revitalizing a Classic Brand

1. What is Cacharel's brand identity? What are its tangible and intangible components?
2. Does the Cacharel umbrella brand itself have an identity beyond that of its sub-brands? Which sub-brands are mostly responsible for creating Cacharel's identity?
3. What is the root source of Cacharel's maturity crisis and how can understanding the brand's identity help?
4. Should Kataschnias bring the Cacharel brand closer to where the market is now? Should he focus on meeting the desires of contemporary consumers (at the time of the case), or on remaining faithful to the brand's heritage?

Exploring Brand-Person Relationships: Three Life Histories (Condensed)

1. Think about the life stories of the three informants in the article and their quotes regarding the brands they use. Is it appropriate to say that these consumers have formed relationships with the brands they know and use? In what ways yes, in what ways no?
2. Based on the article, what kinds of connections form between consumers and their closely-held brands? Are these connections specific to individual brands, or can patterns be identified across brands in a given customer's portfolio?
3. Are Jean's relationships different from Karen's or Vicki's? If so, how are they different? Whose brand relationships are strongest? Why?
4. Think about the pool of brand relationships available for study in the article. Can you think of ways to summarize and describe these relationships in ways that might be managerially useful?
5. Which brand relationships in the case would you describe as especially strong and enduring? What makes you describe them as strong? If you wanted to measure the strength or quality of a brand relationship, what questions would you ask the consumer?
6. Think about the traditional ideas of brand loyalty, customer satisfaction and brand equity. Have the stories of Jean, Karen and Vicki altered your sense of the meaning of these terms in any way? If so, how so?

Building Brand Community on the Harley-Davidson Posse Ride

1. Should Harley-Davidson continue to sponsor the Posse Ride? Why or why not? What role does the Posse Ride currently play in the HOG events mix? What role should it play going forward?
2. What is HOG's role in developing community for the Harley-Davidson brand?
3. Evaluate Harley's strategy and performance in "getting close to its customers."
4. How can HOG itself be maximized for H-D?
5. For class, try to come up with another example of a brand that successfully cultivates a brand community (perhaps a brand community you are a part of). What is the nature of that community? How does the brand cultivate the community? What role does the community play in helping to build the brand? Are there any downsides of the community for the brand?

Samsung Electronics Company: Global Marketing Operations

1. How strong was the Samsung brand before Kim's arrival?
2. What did Kim do to strengthen the brand?
3. What do you think of the method and measures developed to assess the Samsung brand across markets?
4. Can Samsung pass Sony and become a top ten global brand?

Brand Storytelling at Shinola

1. What is Shinola's brand story and how powerful is it? From what does it derive its power? How does it build meaning for the Shinola brand?
2. Why do contemporary consumers appear to be responding to Shinola's story? Which needs does it fulfill for them?
3. How authentic is Shinola's brand story? How much does authenticity matter to luxury consumers? What kinds of authenticity matter? What should Shinola do to be perceived as an authentic brand?
4. How effective/ineffective is Detroit for place branding? What are the opportunities and risks of aligning Shinola with Detroit?
5. As Shinola expands into international markets, how should the Shinola story be changed, if at all? Why?
6. Have Washburn and Kartsotis made the right move in launching the sub-brand Detrola? Why or why not? How might it affect Shinola's brand equity?
7. How well does the Shinola Hotel fit into the brand strategy? Why?
8. How should Washburn respond to the RETHINK SHINOLA movement?
9. What can other brands (luxury and otherwise) learn from Shinola's experience building a new (luxury) brand in today's contemporary marketplace?

Selecting a New Name for Security Capital Pacific Trust; Naming the Edsel (Condensed); Claiborne Asks Web Surfers to Name New Line

1. Is the choice of brand name significant? Why or why not? What is the role of the brand name?
2. What makes for a "good" brand name? A "bad" brand name?
3. What different kinds of brand names are there? Is one type inherently better than another?
4. What key choices and trade-offs must a manager make in selecting a brand name?
5. What options do managers have for name generation? What options do managers have for name evaluation? Reflecting on the naming stories presented in these three cases, what makes a naming process better than another?

Can 3G Capital Make Burger King Cool Again?

1. How has Burger King been positioned (and perceived) historically? What is the state of the brand at the time of the case?
2. In the case, management is considering five different potential positioning strategies. Which do you recommend? Why?
3. With an advertising budget dwarfed by competitors, Burger King needs to choose carefully where to invest. Make a recommendation for how BK should allocate its marketing dollars, the role of social media in the overall strategy, what messages (creative) should be emphasized, and why.

Individual Assignment #1 Brand Relationship Interview

The reading, “Exploring Brand-Person Relationships,” will provide insight into how to approach this interview. The case itself illuminates the concept of brand meaning by looking in-depth at the connections that form between three women and the brands they use. Thus, it offers a glimpse of the insights that are possible when consumers’ lives are understood holistically, and brands are considered to be part of those lives. Perspectives from psychology, sociology, and the study of culture can be applied to illuminate the meanings brands contain for the consumers who use them. The guide posted on Canvas, “Strategies for Qualitative Interviews,” also offers best practices for conducting interviews.

Interview a MKTG 278 classmate regarding a relationship they have or had with a brand. The brand you interview this person about should **NOT** be the brand you’re focused on in your Brand Audit Project.

Please prepare a 2-page maximum (single spaced) in-depth summary that includes your answers to the questions below.

Your interview should be focused on learning information about the relationship that can be managerially useful.

1. What key insights were revealed about how this consumer views, relates to and connects with the brand? How would you characterize your classmate’s relationship with the brand? How and why was the relationship built, maintained, etc., over time?
2. As a brand manager, what would you do with this information?
3. How might you take the insights you’ve identified and examine them more quantitatively (amongst a larger population) to learn more broadly about the type, quality and strength of relationship revealed in your interview? Be specific. For example, if you’d like to conduct a survey to assess these insights on a larger scale, you should describe the *specific* survey questions and potential responses that would allow you to assess the extent to which your insights apply to a broader population.

Individual Assignment #2

Personal Brand Image-Identity Gap Analysis & Personal Brand Positioning Statement

To manage any brand effectively, you must constantly be in touch with your brand strategy and what your customers think about your brand. It's often the case that there are differences between the internal perceptions of a brand and external perceptions. It helps to have some language to pull these constructs apart: *Brand identity* is defined as the set of (aspirational) associations the company has for its brand; *Brand image* is defined as the set of (actual) associations customers have with the brand. Understanding how the brand is perceived internally and externally is critical to build and manage a strong brand.

This concept is equally useful in assessing and managing your personal brand. To conduct an image-identity gap analysis for your personal brand, do the following:

1. Assess your identity (i.e., how you see yourself), by writing down:
 - a. What are 5 words that you strongly associate with yourself?
 - b. What are 3 (positive) things you are not? For example, what are three areas of incompetence?
2. Assess your personal image (i.e., how others see you), by asking at least 10 people—family, friends, classmates/colleagues:
 - a. What are the first 5 words that come to mind when they think of you?
 - b. What are 3 (positive) things you are not?
3. Visually capture your personal image by creating two separate word clouds, using a website like www.wordart.com. The first word cloud should include the characteristics that your respondents provide in 2a above. The second word cloud should include the (positive) things people said you are not (2b above).
4. Analyze your findings:
 - a. Are there discrepancies/gaps between your identity and image? What are they? What do you think has led to those discrepancies?
 - b. Would it (ever) be important to address those gaps? If yes, what steps can you take to close them? If not, why is it not important to address the gaps?
 - c. Given this image and identity information, and with respect to a certain group (e.g., Wharton students, all students or young professionals, your family, your gender, etc.), what are your points of parity? What are your points of differentiation? That is, with the insight you gained from assessing your identity and image, how should you position your personal brand?
5. Pulling from all of the above, draft a positioning statement for yourself. The statement should capture your UNIQUE personal brand essence. It should also be appealing to your target audience. Choose your target audience: who are you trying to influence and impress? Keep in mind that to be compelling, you must be concrete in the support you provide. The template below identifies each component that should be included in your positioning statement. The components need not appear in this exact order.

Positioning Statement Template:

_____ Your name _____ (product/brand)
 is _____ (unique and most important claim)
 among all _____ (competitive set/frame of reference)
 for _____ (target audience)

because _____ (concrete support/reasons to believe).

Individual Assignment #3
Personal and Brand 6-Word Stories

Tell your story...but in just six words. Even if some of the elements remain unwritten (and are just hinted at or implied), your story should contain a protagonist, conflict, obstacles or complications, and a resolution. For instance, some say that Hemingway's famous 6-word story was amongst his best work: "For sale: baby shoes, never worn."

Your assignment is to write two 6-word stories:

- 1) Your personal story. You might choose to tell a 6-word story that supports the positioning statement that you developed for Individual Assignment #2. Or you might choose to tell a different story about yourself. No explanation necessary—just your personal 6-word story.
- 2) The story of your Brand Audit Project brand. Please list the name of your brand before your brand story. Each Brand Audit Project team member will write their own unique story for the team's chosen brand. Again, no explanation required.

Individual Assignment #4
Brand Purpose Analysis

Details to be provided.