MKTG 266: Marketing for Social Impact

Professor Deborah A. Small
JMHH 760
deborahs@wharton.upenn.edu
Office hours: Tuesday, 12-1pm
https://upenn.zoom.us/j/97559204352

Grading Assistant:
Siyuan Yin
syyin@wharton.upen.edu
Office hours: Thursday 4pm-5pm
https://upenn.zoom.us/j/7026529474

Class: Tuesday & Thursday
10:15-11:45am SHDH 211
1:45-3:15pm G65

Course Overview

Private and public sector firms increasingly use marketing strategies to engage their customers and stakeholders around social impact. To do so, managers need to understand how best to engage and influence customers to behave in ways that have positive social effects. This course consists of three distinct but connected parts. The first part of the course focuses on *social* marketing strategies for changing the behavior of a target segment of consumers on key issues in the public interest. The second part explores these initiatives within the context of specific issues (e.g., environmental sustainability, health behaviors, financial decisions, etc.). The third part of the course examines the growing role of corporate social initiatives as they relate to marketing.

For the first time, this course is being offered as an **Academically Based Community Service (ABCS) course** supported by the Netter Center for Community Partnerships. The purpose of this program is to offer more practical, collaborative problem-solving experiences as part of the learning experience. As described below, the final group project for this course will be carried out in partnership with local organizations affiliated with the Netter Center. More on this below!

Format

Classroom time will be devoted to a combination of discussions, written cases, and live cases with guest lectures from non-profits and for-profit firms. To facilitate your application of course concepts to areas that you care about, writing and speaking assignments will allow you to choose areas of interest to practice what you learn.

Who Should Take This Course?

This course is targeted towards students who wish to make a positive difference in the world by effectively changing others' behavior. The topics we cover will cut across approaches utilized in for-profit, non-profit, and government entities, and we will discuss the strengths and challenges of each. Therefore, it is not a prerequisite to aspire to a non-traditional business student job. However, if a student's goal is to use Corporate Social Responsibility (CSR) solely as a means to profit seeking, then this course is probably not suited for him/her. Indeed, we will have critical discussions about if and when social impact and profit-seeking objectives align. As discussed below, there are many writing assignments and public speaking assignments, so this course is also targeted for those who like to write and speak!

Reading Materials

There is no textbook for this class. Readings will be available on study.net (listed in syllabus with a *).

In addition, supplementary readings—mainly from the popular press—will be distributed through Canvas so that we all stay current on trends in social impact. I encourage students to post articles on Canvas when they find pieces of relevance on their own.

Note that there will be a small charge on your bursar bill for photocopies of slides handed out in class.

Finally, I also recommend a number of additional books/articles that are not required, and I am always happy to provide personal recommendations.

Live Cases

To complement our own discussions, we are fortunate to have a number of amazing visitors with passion, skill, and a track record of using marketing for social good. Participation is mandatory and assignments will build off of these cases.

Evaluation:

Criteria	Details	Due	Weights
1. Behavioral Process Map	Appendix 1	09/09/21	5%
2. Individual Writing Assignments	Appendix 2		
Case Prep for Behavioral Insights Team		09/21/21	15%
Case Prep for Oral Rehydration Therapy		10/12/21	15%
Case Prep for Pepsi Refresh		11/18/21	15%
3. In-class exam		11/09/21	25%
4. Group project	Appendix 3	PDF due 12/2/21 Presentations on 12/2 & 12/7	25%
Total			**100%**

1. **Behavioral Process Map (5%)--**_see appendix 1_

2. Individual Writing Assignments (15% each)-_see appendix 2_

3. **In-class Exam (25%)**
   This exam will cover all of the course concepts and applications that have been covered. It will consist of some multiple-choice, some short answer, and one long(er) answer.

4. **Group Project (25%)-**_see appendix 3_
   .

Policies and Other Course Information

- All course information will be made available on Canvas. <u>All written assignments should be submitted on Canvas by 10:30am on date listed</u>.

- To accommodate students with COVID-related issues, all classes will be recorded and made available on Canvas to all registered students.

- _Feedback from you:_ I enthusiastically welcome input from students. For example, if you learned a lot (or did not learn a lot) from a particular reading or guest lecture, please let me know. I welcome you to meet with me during office hours or to contact me via email. Finally, I encourage you to contribute topic-relevant comments and questions during class time.

- _Piazza:_ This term we will be using Piazza for class discussion. The system is highly catered to getting you help fast and efficiently from classmates, the TA, and myself. Rather than emailing questions to the teaching staff, I encourage you to post your questions on Piazza. If you have any problems or feedback for the developers, email team@piazza.com.

  Find our class page at: https://piazza.com/upenn/fall2021/mktg266/home

August 31: Introduction

Part 1: Using Marketing Tactics for Social Impact

September 2: Understanding Your Target Consumer

Assigned Reading(s):
- UK Behavioral Insights Team: "Test Learn, Adapt"*

September 7: Understanding Your Target Consumer (continued)

Assigned Reading(s):
- Boston Fights Drugs A and B*

September 9: Information Provision

Assigned Reading(s):
- Gerber, A. S. & T. Rogers (2009), "Descriptive social norms and motivation to vote: Everybody's voting and so should you," *The Journal of Politics, 71*(1), 178-191.*

Due: Behavioral Process Map

September 14:   Live Case with Tony Foleno and Catherine Chao
The Ad Council

Designing PSAs and Measuring Their Impact

September 16: No class (Yom Kippur)

September 21: Information Provision (continued)

Assigned Reading(s):
- Behavioral Insights Team (A)*

Due: Case Prep for Behavioral Insights Team

September 23: Live Case with Chris Marvin, Marvin Strategies

Changing Perceptions of American Veterans

September 28: Choice Architecture

Assigned Reading(s):
- Thaler, Sunstein, Balz (2012), "Choice Architecture," in E. Shafir, *The behavioral foundations of public policy,* 428-439.*

September 30: Choice Architecture continued

October 5: Incentives

Assigned Reading(s):
- Gneezy, Meier, and Rey-Biel (2011), "When and Why Incentives (Don't) Work to Modify Behavior," *Journal of Economic Perspectives, 25,* 191-210.*
- Volpp et al. (2009), "P4P4P: An agenda for research on Pay-For-Performance For Patients," *Health Affairs, 28,* 206-214.*

Part 2: Areas of Social Impact

October 7: Healthy Lifestyle Behaviors

Assigned Reading(s):
- HBS case: Demarketing Soda in New York City*

October 12: Global Health/Development

Assigned Reading(s):
- HBS case: Oral Rehydration Therapy*

Due: Case Prep for Oral Rehydration Therapy

October 14: No class—Fall break

October 19: Live Case with Neela Saldanha

October 21: Philanthropy

- Small et al. (2018), "Should you broadcast your charitable side?" *Behavioral Scientist.*
- Gneezy, U., E. A. Keenan, & A. Gneezy (2014), "Avoiding overhead aversion in charity," *Science*, *346*, 632-635.*
- Berman et al. (2016), "Why we resist treating charities like investments," *Market Watch.*

October 26: Live Case with Jasmine Penny
Donorschoose.org

October 28: Financial Decision Making

Assigned Reading(s):
- Hershfield et al. (2015), "Leveraging Psychological Insights to Encourage the Responsible Use of Consumer Debt," *Perspectives on Psychological Science, 10*(6), 749-752.*
- Benartzi, S. (2010), "Behavioral Finance and the Post-Retirement Crisis."*
- Benartzi, S. & S. Bhargava, S (2020), "Digital Design Drives User Behavior," *Harvard Business Review*.
- Take the Quiz: Could you Manage as a Poor American?

November 2: Environmental Sustainability/ Political Participation

Assigned Reading(s):
- Allcott, H. & S. Mullainathan (2010), "Behavioral science and energy policy," *Science*, *327*, 1204-1205.*
- Larrick, R.P. & J.B. Soll (2008), "The MPG illusion," *Science, 320,* 1593-1594.*

- Tasche, Tom (2020) We're all new voters now
- Neri, D.J., Jess Leifer, & A. Barrows (2017) Graduating students into voters

November 4: ABC Project/Netter Center Overview

November 9: In-class exam

Part 3: Corporate Marketing with Social Impact

November 11: Customer Perceptions of "Good" Brands   Assigned Reading(s):   ▪ Trudel, R. & J. Cotte (2009), "Does it pay to be good?" *MIT Sloan Management Review*.*
November 16: Jennifer Hartz, Corporate Hartz
November 18: Customer Perceptions of "Good" Brands (cont.)   Assigned Reading(s):   ▪ Case for discussion: The Pepsi Refresh Project: A Thirst for Change*   Due: Case Prep for Pepsi Refresh
November 23: Brian Linton, CEO of United by Blue
November 25: No class, Thanksgiving break
November 30: Catch up and group meetings
December 2: Intervention Presentation Day 1   Due: Intervention Proposal Presentation (posted in pdf form to Canvas before class)
December 7: Intervention Presentation Day 2
December 9: Wrap up

Appendix 1: Behavioral Process Map (Individual Work)- Due September 9

Identify an existing social problem of particular interest to you that could possibly be fixed or at least improved upon through good marketing and ultimately by changes in consumer behavior. This should be a topic that you feel passionately about. The problem can be a problem of adoption, of compliance, of behavior change, etc. but it should be a specific, relatively narrow problem whose context you can delve deeply into. The more you have access to learning about this problem through raw data that you can analyze, field trials that have been done, sociology/anthropology work that has been done on it, or collaborators/individuals you know in the field who can give you more insight on it, the better.

Your task is to sketch a basic behavioral map, which includes a definition of the problem, the "map" of the process, and arrows pointing to specific "bottlenecks" where you hypothesize they may occur. The deliverable is a one-page diagram to be submitted on Canvas.

*Note: When selecting a topic, please avoid the topic of political participation/voting as there will be plenty of opportunity to focus on this later on in the group project.

Appendix 2: Individual Writing Assignments

*Each assignment should be no more than 2 pages double-spaced.

1. Case Prep for Behavioral Insights Team- Due September 21

Read the case study and design a revised letter to delinquent tax payers. On canvas, submit your letter as well as a brief explanation of why you included/excluded what you did. You may use information provided in the case and/or your own creative ideas. Your explanation should be less than one page. Bring a print-out of your letter to discuss in class.

3. Case Prep for Oral Rehydration Therapy- Due October 12

Read the case study and consider the bottlenecks limiting the adoption of oral rehydration   therapy. Submit a diagram of a behavioral map that includes the most significant bottlenecks—indicating which are structural and which are "behavioral". Then propose one intervention that you are prepared to discuss with classmates. Explain the reasoning for proposed intervention.

4. Case Prep for Pepsi Refresh- Due November 18

Briefly discuss the pros and cons of Pepsi Refresh. What would you recommend they do next (at the conclusion of the case) with Pepsi Refresh—stay the course, modify, or quit? Provide arguments for your recommendation.

Grading system for written assignments:

These will be graded on a 1-15 scale. Please note that very few students receive a 15. A grade below a 15 does not imply that you made a mistake. We reserve 15s for papers that really blow us away with a creative insight that makes us go "I wish I had thought of that!"

Appendix 3: Group Project

Due December 2 (this is the deadline for all students regardless of presentation date)

This project is in partnership with the Netter Center for Community Partnerships. Groups will work with one of two local organizations dedicated to increasing voter registration, engagement and turnout among young eligible voters in Philadelphia: a) Penn Leads the Vote and b) High School Voter Project.

1. After hearing from these organizations in class on November 4, each group will pursue a campaign plan focused on one objective and one of the two organizations. Students will gather data on the problem and try to understand the customer through survey or interviewing.

2. Then each group will produce a **Behavioral Process Map,** which defines and diagnoses the problem and identifies what bottlenecks exist that lead to failure of a consumer to meet the goal (e.g., register to vote).

3. Given the insights from the behavioral mapping exercise, each group will design an intervention in partnership with an organization, based on class learnings about what types of interventions are suitable for specific types of bottlenecks and will determine a way of testing and measuring the intervention's effectiveness. At the end of the semester, each group will present their proposal in class and to the organizations.

Your presentation should include:
   a. A clear definition of the problem.
   b. A brief reference list of the existing literature. (of course, you should be able to describe these papers when asked)
   c. A brief summary of any insights gleaned from survey or interviewing.
   d. Hypotheses about bottlenecks contributing to the problem.
   e. A proposal for testable marketing intervention that is directly linked to your hypothesis about the underlying reason for the problem you've identified. Explain how you plan to test whether the intervention is effective and what hypotheses it proved/disproved.

   Note: Once I know the class enrollment, I will suggest optimal group size.

   Please submit a .pdf of your presentation on Canvas before class.

Grading Criteria for Presentation
   1. Analysis of Issues Involved: How well you have learned from the concepts in the course (5 points)
   2. Insights gleaned from new data and behavioral mapping (5 points)
   3. Innovative Solutions (5 points)
   4. Research Design (5 points)
   5. Presentation Appearance/Clarity (5 points)