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 focused on business-to-consumer marketing (as opposed to business-to-business marketing).

Objective
This course will help you to develop knowledge and skills in the creative and rigorous application of marketing strategy concepts and methods in order to enhance long run value for 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 strategy across the product life cycle and developed a conceptual and capability basis 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 against new competitors
6. managing decline and demise
Course Logistics

Grading and Pedagogy. The learning methods are a combination of lectures, cases, guest speakers, and a team-based Shark Tank project. There is no Final Exam for this course, but there is a Midterm Exam scheduled for Wednesday, Nov. 15th.

Office Hours. I am always pleased to meet with students and my schedule is flexible. Michele (klekotka@wharton.upenn.edu) can help find a mutual time. You also can reach out to one of the TAs to schedule a coffee chat with them.

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 counts as part of your participation grade.

Classroom Commitment. Please arrive promptly to class so that we may begin and end on time. The course is made more valuable when students participate, through in-class contributions and by posting relevant material to Canvas Discussion Board. Both count toward your class participation grade. To eliminate the potential for distraction, please refrain from using your laptop or other devices during class. All of us should place our mobile phones on mute. For Penn’s Code of Academic Integrity, which defines academic dishonesty, visit the website here.

COVID Protocol. In accordance with Penn guidelines, masks are optional, with a recommendation that people with underlying medical conditions wear masks indoors. We also would prefer if you did not eat in the classroom. Given the continuous COVID transmission in Philadelphia and on campus, I choose to wear a mask in the building except when lecturing.

Guest Speakers. Guest speakers often will join us via Zoom since they are from throughout the U.S. and Europe. I will ask a student to introduce each guest speaker and then to add thanks at the end of the session. It would be great if class members emailed me in advance any questions that you would like the speaker to address, and I will forward to them.

Assessment

<table>
<thead>
<tr>
<th>Individual Level (70%)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Midterm Examination</td>
<td>30%</td>
</tr>
<tr>
<td>Written Case Analysis of Smartick</td>
<td>15%</td>
</tr>
<tr>
<td>Written Case Analysis of De Beers</td>
<td>15%</td>
</tr>
<tr>
<td>Mini assignments*</td>
<td>5%</td>
</tr>
<tr>
<td>Participation and postings to Canvas</td>
<td>5%</td>
</tr>
</tbody>
</table>

*Mini Assignments will not be graded but your successful completion will count 5% towards your final grade

<table>
<thead>
<tr>
<th>Team Level (30%)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>“Shark Tank” Projection Submission</td>
<td>20%</td>
</tr>
<tr>
<td>Team Debate of Ryanair or Godiva Case</td>
<td>5%</td>
</tr>
<tr>
<td>“Shark Tank” evaluation by entire class</td>
<td>2.5%</td>
</tr>
<tr>
<td>Intragroup evaluation of team members’ contribution to project</td>
<td>2.5%</td>
</tr>
<tr>
<td>Date</td>
<td>Topic</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------------------------------</td>
</tr>
<tr>
<td><strong>IDEA GENERATION</strong></td>
<td></td>
</tr>
<tr>
<td>Wednesday 8/30/23</td>
<td>Course Overview</td>
</tr>
<tr>
<td>Monday 9/4/23</td>
<td>NO CLASS SESSION</td>
</tr>
<tr>
<td>Monday 9/11/23</td>
<td>Designing Strategies for the Future</td>
</tr>
<tr>
<td>Wednesday 9/13/23</td>
<td>Disruption</td>
</tr>
<tr>
<td><strong>MARKET INTRODUCTION</strong></td>
<td></td>
</tr>
</tbody>
</table>
| Monday 9/18/23  | The Role of Marketing in Society  | **Case Study**: Toms Shoes  
**Readings**: “Business Roundtable Redefines the Purpose of a Corporation,” and “Company Purpose and Profit”  
**Interactive Online Reading**: “Harvard Business School’s Case Companion.” The reading/exercise will help you prepare your case analyses in the course. | **Mini Assignment**: Is Toms’ marketing strategy ethical? Write a 250-word response Upload your answer to Canvas by 9 a.m., Sept. 18th (1 point) |
| Monday 9/25/23  | Launching a New Service           | **Case Study**: Smartick vs. Khan Academy  
Written Case Study Analysis | See Instructions in Syllabus Upload to Canvas by 9 a.m., Sept. 25th (15-points) |
| Wednesday 9/27/23 | Launch and Lifecycle Management   | “Winning the Take Off Battle”                                           |                                                                          |

Don’t forget to post articles or thoughts to Canvas and participate in class. This counts as 5% toward your grade.
<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Activity</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday 10/2/23</td>
<td>Competitive Positioning and Challenge</td>
<td>Case Study and Team Debate: Ryanair Strategic Positioning (A)</td>
<td>See instructions in Syllabus. (5 points)</td>
</tr>
<tr>
<td>Wednesday 10/4/23</td>
<td>Market Defense</td>
<td>Reading: “Should You Launch a Fighter Brand?”</td>
<td></td>
</tr>
<tr>
<td>Monday 10/9/23</td>
<td></td>
<td>Launching a New Product</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Guest Speaker: Fireside Chat with Randy Goldberg (Bombas)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Reading: Bombas Case Study. (Treat as a reading. Do not analyze)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wednesday 10/11/23</td>
<td>Positioning and Brand Equity</td>
<td>Case Study: Dunkin <em>(Note: This is a short and informational reading. In-depth analysis is not required.)</em>, and read “Corporate Rebranding—An Exploratory Review”</td>
<td></td>
</tr>
<tr>
<td>Monday 10/16/23</td>
<td>Seeking Growth</td>
<td>Case Study and Team Debate: Rebranding Godiva: The Yildiz Strategy</td>
<td>See instructions in Syllabus. (5 points)</td>
</tr>
<tr>
<td>Wednesday 10/18/23</td>
<td></td>
<td>Luxury Marketing</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Guest Speaker: Daniella Vitale, CEO</td>
<td></td>
<td>Salvatore Ferragamo</td>
</tr>
<tr>
<td>Monday 10/23/23</td>
<td>Luxury and Fashion CLASS PHOTO</td>
<td>Overview of Midterm</td>
<td>Refute the anti-laws of marketing. Choose three to refute and write 250-words. Upload to Canvas by 9 a.m., Oct. 23rd (2 points)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Reading: “Anti-Laws of Marketing,” and “Conspicuous Consumption”</td>
<td></td>
</tr>
<tr>
<td>Wednesday 10/25/23</td>
<td>Shark Tank Meetings</td>
<td>TAs will meet with Shark Tank Teams during this class session via Zoom. Exact meeting times will be assigned to each Team.</td>
<td></td>
</tr>
<tr>
<td>Monday 10/30/23</td>
<td>Resale Opportunity Strategy</td>
<td>Case Study: RealReal</td>
<td></td>
</tr>
<tr>
<td>Wednesday 11/1/23</td>
<td></td>
<td>Growth Scenarios in Gaming</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Guest Speaker: Ernie Economides, Director</td>
<td></td>
<td>National Football League</td>
</tr>
</tbody>
</table>

Don’t forget to post articles or thoughts to Canvas and participate in class. This counts as 5% toward your grade.
<table>
<thead>
<tr>
<th>Day</th>
<th>Topic</th>
<th>Notes</th>
</tr>
</thead>
</table>
| Monday 11/6/23   | Changing Consumer Behavior                                           | **Case Study:** De Beers Group  
Written Case Study Analysis  
Review in preparation for Midterm on Nov. 16th  
See Instructions in Syllabus  
Upload to Canvas by 9 a.m., Nov. 6th (15-points) |
| Monday 11/13/23  | Livestream Commerce                                                  | **Assignment:** Watch (3) livestream commerce events and write a 250-word analysis proposing best practice for sales success. (1 point)  
**Reading:** “Selling on TikTok and Taobao" |
| Wednesday 11/15/23 | The Resale Economy                                                  | **Guest Speaker:** Fireside Chat with Sarah Davis, Founder, Fashionphile |
| Monday 11/20/23  | Livestream Commerce                                                  | **Assignment:** Submit draft of Shark Tank slides to be used for the final presentation  
Upload to Canvas by 9 a.m., Nov. 20 |
| Wednesday 11/22/23 | NO CLASS SESSION                                                 | Happy Thanksgiving! |
| Monday 11/27/23  | Shark Tank Preparation                                               | Meetings with Prof. Robertson and TAs on Shark Tank Teams. Prep for presentations.  
We will assign times to each team in advance. |
| Wednesday 11/29/23 |                                                                 | **Guest Speakers Oliver Chen (Cowen) and Tom Nolan (Kendra Scott)** |
| Monday 12/4/223  | Shark Tank Preparation                                               | **Assignment:** *ENTIRE CLASS* must submit their slides to Canvas by 9 a.m. on Dec. 4th  
(20 points) |
| Wednesday 12/6/23 | Shark Tank Presentations                                             | **Guest Shark Tank Investor**  
Andy Newcomb and Emily Foote  
**Shark Tank Feedback and Course Summation**  
**Assignment:** *ENTIRE CLASS* Complete Qualtrics survey:  
"Would you fund this project"  
Due by 9 a.m. on the 6th (2.5 points)  
Complete Qualtrics survey:  
Intragroup Evaluation of Peers  
Due by 9 a.m. on Dec. 6th.  
(2.5 points). |
| Monday 12/11/23  | Shark Tank Presentations                                             | **Guest Shark Tank Investor**  
Andy Newcomb and Emily Foote  
**Shark Tank Feedback and Course Summation**  
**Assignment:** *ENTIRE CLASS* Complete Qualtrics survey:  
"Would you fund this project"  
Due by 9 a.m. on the 6th (2.5 points)  
Complete Qualtrics survey:  
Intragroup Evaluation of Peers  
Due by 9 a.m. on Dec. 6th.  
(2.5 points). |
| Monday 12/18/23  | Shark Tank Presentations                                             | **Guest Shark Tank Investor**  
Andy Newcomb and Emily Foote  
**Shark Tank Feedback and Course Summation**  
**Assignment:** *ENTIRE CLASS* Complete Qualtrics survey:  
"Would you fund this project"  
Due by 9 a.m. on the 6th (2.5 points)  
Complete Qualtrics survey:  
Intragroup Evaluation of Peers  
Due by 9 a.m. on Dec. 6th.  
(2.5 points). |

**OPTIONAL:** Shark Tank Team Meetings with Prof. Robertson and TAs can be arranged. Reach out to schedule via Zoom.
About the Professor and Teaching Assistants

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

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, the launch of the Wharton Business Radio Show on SiriusXM, 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).

TBD Teaching Assistant, MBA Candidate
[Bio forthcoming]

TBD, Teaching Assistant, MBA Candidate
[Bio forthcoming]
About the Guest Lecturers – Not Confirmed for 2023

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.

**Kobie Fuller.** Partner, Upfront
Kobie has been a partner at Upfront since 2016, with a core investing focus in SaaS, marketing technology, and emerging technologies including VR and AR. His notable Upfront investments include Bevy, Wave, Cordial and MetaCX. While at Upfront, Kobie also founded and incubated Valence, a platform to unlock economic opportunity, investment and community for Black professionals; he is also on the Advisory Board for PledgeLA, an organization working to increase diversity and equity in tech. Prior to Upfront, Kobie was an investor at Accel, helped found OpenView Venture Partners, and was an investor at Insight Venture Partners, with early investments including Exact Target and Oculus. He was also the Chief Marketing Officer at LA-based REVOLVE, one of the largest global fashion e-commerce players. Kobie graduated from Harvard College.

**Randy Goldberg.** Co-Founder and Chief Brand Officer, Bombas
Randy is responsible for bringing the brand to life, creatively conveying the Bombas brand and mission, and leading the design team to create product that boasts an innovative combination of fashion, function, and philanthropy. Goldberg graduated from The McDonough School of Business at Georgetown University with a BS in Finance, and is a veteran in digital creative, copywriting, strategy and branding. He has consulted, written and developed unique content for top companies including Nike and vitaminwater, and led the creative development of digital media brand UrbanDaddy. Prior to Bombas, Randy also founded Tennis Partners, a creative consultancy, and Pop Up Flea, a personally curated pop-up market of new and vintage men's goods. Randy has been featured on NBC TODAY Show, CBS This Morning, Bloomberg TV, [Esquire.com](http://Esquire.com) and was named the 2017 Entrepreneur of the Year by Georgetown Business.

**Daniella Vitale.** CEO, Salvatore Ferragamo
Daniella Vitale is the chief executive officer North America. This marks a return to Ferragamo for Vitale, who began her career at the Florence-based company in merchandising. She left in 1995 to become VP of Wholesale, then moved to Gucci to cover the position of CEO America. In 2010, she joined Barneys New York, rising to the CEO position, exiting in November 2019 when the company was sold to Authentic Brands Group. She then became chief brand officer and executive vice president of Tiffany & Co. She left this post after a short transition period this year in the wake of LVMH’s acquisition of the storied American jewelry brand. Vitale has also been very active in philanthropy, receiving multiple awards for her charitable contributions including the Champion of Children award from lift, Women Who Get it Right from National Breast Cancer Foundation Fund, and the Honorary Award for her philanthropic work from UJA Federation.

**Ernie Economides.** Director, National Football League
[Bio forthcoming]

**Sarah Davis.** Founder, Fashionphile
[Bio forthcoming]
**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.

**Mark Yuan, CEO and Co-founder, And Luxe, Inc.**

Mark Yuan has been a leading expert in live stream e-commerce since 2016. He is co-founder and CEO of two fast-growing companies. And Luxe Inc was founded in 2009 in New York. Under Mark, and co-founder, Zoe Yu Zhang’s leadership, And Luxe Inc introduced live stream selling to 200 brands successfully and was named the best live stream company in 2018 and 2019 by Alibaba Group. The company currently focuses on developing executable programs for companies to build their own live stream capabilities. In 2021, he co-founded a technology startup, Wonder Live Shopping, a technology platform that enables American brands and retailers to connect and sell to their customers interactively, socially and conveniently without any tech integration, coding, or significant investment.

**Zoe Yu Zhang, Co-founder, And Luxe, Inc.**

Zoe Yu Zhang and her co-founder, Mark Shengyu Yuan, launched And Luxe Inc in 2009, which aimed to become the bridge between Western brands and the Chinese market. Since then, Zoe has served as its Chief Buyer and Creative Director. In 2016, Zoe was the creative force behind And Luxe’s shift to live stream shopping and one of the original group of live streamers that pioneered this new way to sell. In 2017, she was a panelist at the e-Commerce Conference in China where she was invited to share her expertise in cross-border e-commerce and live shopping. In 2018, under Zoe’s leadership, And Luxe team was awarded the Taobao Global Best Livestreamer of the Year Award. In the same year, And Luxe’s success story marketing American and European brands was featured in Alibaba Group’s Best of 2018 presentation. Zoe earned two separate degrees in Fashion Design and Advertising Communications from Instituto Marangoni and the University of Bedfordshire respectively in the United Kingdom in 2004. The following year, she immigrated to the United States and started her career as a fashion designer at Vandale Industry.

**Jing Wang, Business Intelligence Manager, Alibaba**

[Bio forthcoming]
Hamish Taylor. Award winning CEO and Inspirational Speaker and Broadcaster
With a Resume that the London Times described as “takes some beating”, Hamish Taylor has an award-winning record of driving innovation and change in a number of very different environments. Hamish was trained in Brand management at international consumer goods giant Procter and Gamble, a Management Consultant at Price Waterhouse, Head of Brands at British Airways, CEO of International high-speed railway Eurostar, and CEO of Sainsbury’s Bank (the world’s first supermarket bank) - all before he was 40! In each case, he left behind a record of significant growth/turnaround triggered by a willingness to challenge industry/organisation norms and place the customer at the core of all activities. Regularly featured in broadcast media, today Hamish acts as an adviser to some of the world’s largest companies (and Governments). Over 350 organizations in 48 different countries have sought Hamish’s inspiration. The Inspired Leaders Network even gave him the title of “master thief” due to his record of stealing ideas from one environment to use in another.

About the Shark Tank Investors

Andy Newcomb, Managing Partner, MissionOG
Andy is co-founder and Managing Partner at MissionOG a growth-oriented investor 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, iDonate, Katapult, PayClip, Solovis, and Onbe. 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 Ecound (acquired by Citi), a pioneer and leader in the prepaid card industry. Preceding Ecound, 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.

Emily Foote, Principal, Osage Venture Partners
Driven by the ideal of providing equal education opportunities for all learners, Emily co-founded Practice, a technology company, which was sold in December 2017 to Utah-based Instructure, a leading technology company in the education and corporate learning markets, respectively known as Canvas and Bridge. As co-founder of Practice, Emily guided the company from a video-based platform in the higher education market to a corporate learning solution and managed organizational growth across offices in Philadelphia and San Francisco. At Instructure, Emily wore many hats including VP of Strategy and, most recently, VP of Customer Success. As a former Teach for America and KIPP teacher, special education lawyer and luddite, Emily now fully embraces technology’s potential to have massive impact on individuals, the communities they live in and the organizations they work for. Emily is a graduate of Drexel Law, from which she graduated cum laude, and the University of Pennsylvania Graduate School of Education where she graduated with honors.
Case Studies and Academic Readings

Case Studies

1. Case Companion: An Interactive Introduction to Case Study Analysis, Harvard Business Publishing (online, interactive reading)
2. Toms Shoes, London College of Fashion, (♯717-0007-1) (In-class discussion)
3. Bombas (Treat as a reading)
4. Smartick vs. Khan Academy (INSEAD 03.2017-6289) (Written Case Analysis)
5. Ryanair Strategic Positioning (A): July 2013. (#7-1872) (Debate Case)
6. Dollar Shave Club. (CS-18-017) (In-class discussion)
8. Dunkin Donuts to Dunkin: A Rebranding Exercise (#521-00049-1) (Treat as a reading)
9. RealReal and the Circular Economy (ESSEG G-229) (In-class analysis)
10. De Beers Group (Ivey, #W17668) (Written Case Analysis)
11. Activision Blizzard. (Treat as a reading)

Readings

3. “Business Roundtable Redefines the Purpose of a Corporation to Promote ‘An Economy that Serves All Americans’” BUSINESS ROUNDTABLE, Aug. 19, 2019
Case Study Discussion Questions

**Cases requiring Written Analysis (15 points each):** DeBeers and Smartick

**Cases for Team Debate (5 points):** Ryanair or Godiva Strategic Positioning

**Cases to be read only, no analysis required:** Activision Blizzard, Bombas, and Dunkin

**Cases for in-class discussion:**

**Toms Shoes**

1. Articulation of Toms concept
2. Is it ethical for Toms to make profits by engaging in charitable acts?
3. Is what Toms doing different than Warby Parker?
4. What should Toms do going forward?

**Dollar Shave Club**

1. What is Dollar Shave Club’s value proposition?
2. How does it differ from Gillette’s?
3. In which way is DSC’s business model disruptive?
4. What are Gillette’s strategic options to defend?
5. What options would you recommend to Gillette?
6. Why would Unilever spend $1bn to acquire loss making DSC

**RealReal**

1. What is the RealReal’s value proposition?
2. Who are the main actors in the resale market?
3. Does the RealReal have a unique and sustainable positioning?
4. What are the advantages and the limitations of the RealReal’s strategy?
5. How should their strategy change?
6. What should be their preferred growth and expansion strategy (U.S., Asia and other markets)?
7. How serious is the Chanel lawsuit to their future?
MKTG 277 Marketing Strategy
Written Case Analysis—Smartick (15 points)

Directions
1. Analyze the Smartick case study.
2. Submit the analysis via Canvas by 9 a.m. on Monday, Sept. 25th
3. Limit 750- words plus two (2) 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 4-points
5. Do not go beyond the information in the case document.

Questions to Consider
1. What is Smartick’s value proposition?
2. How does it compare to competition?
3. What are its go-to market options?
4. What are the rough breakeven economics?
5. Make a decision and justify it.

Guidelines
- This is not a research paper; it is an analysis of the decision to be made
- 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
- You can use bullets to help focus your analysis

Grading Rubric.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Criteria</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Problem presentation</td>
<td>Clearly articulates Smartick’s value proposition and summarizes the challenge faced</td>
<td>3</td>
</tr>
<tr>
<td>Strategic options</td>
<td>Articulates strategic options and pros/cons of each, including breakevens</td>
<td>5</td>
</tr>
<tr>
<td>Decision and rationale</td>
<td>Clearly elaborates recommended decision, provides justification through supporting case and course concepts</td>
<td>4</td>
</tr>
<tr>
<td>Presentation</td>
<td>Arguments should be coherent and convey depth of analysis; exhibits (if any) should support and enhance arguments</td>
<td>3</td>
</tr>
</tbody>
</table>

TOTAL 15
MKTG 277 Marketing Strategy
Written Case Analysis—De Beers (15 points)

Directions
1. Analyze the De Beers case study.
2. Submit the analysis via Canvas by 9 a.m. on Nov. 6th
3. Limit 750-words (double-spaced paper), plus two (2) 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 4-points
5. Do not go beyond the information in the case document

Questions to Consider:
1. What are the main issues De Beers faces?
2. Who are the main actors in the diamond market?
3. Does De Beers have a unique and sustainable positioning?
4. What are the advantages and the limitations of the De Beer’s current strategy?
5. How should their strategy change?
6. What challenges does De Beers face in relation to Millennials?

Guidelines
- This is not a research paper; it is an analysis of the decision to be made
- 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
- You can use bullets to help focus your analysis

Grading Rubric

<table>
<thead>
<tr>
<th>Topic</th>
<th>Criteria</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Problem presentation</td>
<td>Clearly articulates De Beer’s value proposition and summarizes the challenges faced</td>
<td>3</td>
</tr>
<tr>
<td>Strategic options</td>
<td>Articulates strategic options and pros/cons of each</td>
<td>4</td>
</tr>
<tr>
<td>Decision and rationale</td>
<td>Clearly elaborates recommended decision, provides justification through supporting case and course concepts</td>
<td>6</td>
</tr>
<tr>
<td>Presentation</td>
<td>Arguments are coherent and convey depth of analysis; exhibits (if any) support and enhance arguments</td>
<td>2</td>
</tr>
</tbody>
</table>

TOTAL 15
MKTG 277 Marketing Strategy

Debates: Ryanair or Godiva

Directions

Working with your Shark Tank team, you will be assigned to take positions concerning either Ryanair or Godiva. The debate assignment is worth 5-points.

Each team has the following responsibilities:

Prepare a maximum 3-page PowerPoint presentation of the arguments supporting your team’s position as assigned. A hard copy is due before class on the day of the debate. Upload your presentation to Canvas by 9 a.m. on the day of your presentation.

Present in class a constructive argument of your team’s position and a rebuttal of the opposing team’s position.

Debate Format

<table>
<thead>
<tr>
<th>Team 1 Opening Statement</th>
<th>3 minutes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team 2 Opening Statement</td>
<td>3 minutes</td>
</tr>
<tr>
<td>Team 1 Rebuttal</td>
<td>2 minutes</td>
</tr>
<tr>
<td>Team 2 Rebuttal</td>
<td>2 minutes</td>
</tr>
<tr>
<td>Team 1 Closing Statement</td>
<td>2 minutes</td>
</tr>
<tr>
<td>Team 2 Closing Statement</td>
<td>2 minutes</td>
</tr>
<tr>
<td>Class Discussion &amp; Vote</td>
<td>4 minutes</td>
</tr>
</tbody>
</table>

In preparing your debate, I would suggest that the most effective debates will formulate compelling arguments related to our course content, provide evidence to support those arguments, and suggest relevant company examples to support your position.

It is helpful to assign specific portions of the debate to particular group members. For example, one or two people may wish to provide the opening statement, another couple to prepare rebuttal, another couple present the closing statement, and the rest of the team to respond to class questions.

Assessment (by 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 to rebut and answer questions about opposing points of view. The maximum score is 5 points.
MKTG 277 Marketing Strategy

‘Shark Tank’ Team Projects (25 points)

Team Responsibilities

Study the customer experience within one of the following domains: metaverse, NFTs, wearables, malls, sustainability. You will have to narrow how you approach this.

This cannot be a campus strategy. Excluded domains are campus-only food delivery, campus-only furniture rental and other product categories geared toward campus.

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

Assignment (16 slides. No written paper)

<table>
<thead>
<tr>
<th>Slide 1</th>
<th>Title of your project, Team Number and Team Member names</th>
</tr>
</thead>
<tbody>
<tr>
<td>Slide 2</td>
<td>Identify the promising opportunities</td>
</tr>
<tr>
<td>Slide 3</td>
<td>Identify the relevant competitors</td>
</tr>
<tr>
<td>Slide 4</td>
<td>Identify a gap where customer needs are sub-optimally fulfilled</td>
</tr>
<tr>
<td>Slide 5</td>
<td>Propose a new product or service to fill this gap</td>
</tr>
<tr>
<td>Slide 6</td>
<td>State your market segment selection and why</td>
</tr>
<tr>
<td>Slide 7</td>
<td>State your positioning and draw a perceptual map</td>
</tr>
<tr>
<td>Slide 8</td>
<td>State your go-to-market channels (e.g., retail, online)</td>
</tr>
<tr>
<td>Slide 9</td>
<td>State your communication plan to consumers (e.g., advertising, social media)</td>
</tr>
<tr>
<td>Slide 10</td>
<td>List your price and provide your logic</td>
</tr>
<tr>
<td>Slide 11</td>
<td>Estimate your costs</td>
</tr>
<tr>
<td>Slide 12</td>
<td>State your revenue objective and how derived</td>
</tr>
<tr>
<td>Slide 13</td>
<td>Estimate your breakeven (time until revenue meets costs)</td>
</tr>
<tr>
<td>Slide 14</td>
<td>How much money will you have to raise and what percentage of your equity are you willing to give away?</td>
</tr>
<tr>
<td>Slide 15</td>
<td>Now critique your own plan as to its potential limitations or unproven assumptions</td>
</tr>
<tr>
<td>Slide 16</td>
<td>References and Citations</td>
</tr>
</tbody>
</table>

Submission Process (Draft and Final)

1. **ALL TEAMS:** Submit a draft of your slides to Canvas by Monday, Nov. 20th at 9 a.m.
2. **ALL TEAMS:** Submit your final proposal by 9 a.m. on Monday, Dec. 4th.
3. Maximum length is 16 readable slides.

Assessment (25 points)

- 20 points. Valuation of the 16 slides as to their, rigor, logic, creativity and understanding of course concepts. This evaluation will be conducted by Professor Robertson and the TAs.
- 2.5 points. Your peers will vote as to whether they would recommend funding
- 2.5 points. Intragroup evaluation of each team member’s contribution
For Shark Tank projects you may want to use Lippincott Library as a resource.

Mia Wells at Lippincott does a great job providing guides that highlight the databases, surveys and links to relevant articles. Students can access trade associations for industry data. You can access sources like Gartner, market research reports, analyst reports. It’s pretty comprehensive—if you access through the library then most are free. It really all depends on what information you are looking for specifically.

https://guides.library.upenn.edu/consumerbehavior/overview (Links to an external site.)

Guide to researching consumers, their behaviors and demographics including specific databases like Statista and survey data that cover each of those areas.

https://guides.library.upenn.edu/retail (Links to an external site.)

Guide specific to retail with links to Forrester, Mintel Oxygen, and Factiva for articles & links to retail periodicals.

You can also check out the National Retail Federation Research site:

https://nrf.com/resources/nrf-research (Links to an external site.)

You can easily type in a question to Lippincott, such as this one that was posted recently with an answer that links to resources to research:

How do I find data on consumer demographics and buying behavior? (Links to an external site.)

You can also arrange a session with a reference librarian and they will help them navigate the resources. I think the library covers access to most resources that you would need.