

# MKTG 277-2021 DRAFT

## MKTG 277-002 Marketing Strategy

Fall 2021 | MW 1:45 p.m. to 3:15 p.m.

Instructor: Thomas S. Robertson, 769 JMHH  
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Office Hours: M 4-5:30 p.m. or by appointment

TA: Carter Stephens (TBD)  
Email:

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### 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 business-to-consumer marketing (as opposed to business-to-business marketing).

This course is a synchronous format. Although we will record class sessions, you will derive little benefit if your intentions are only to view the recorded sessions and not participate during class time. If so, you should consider not taking the course or taking it pass/fail.

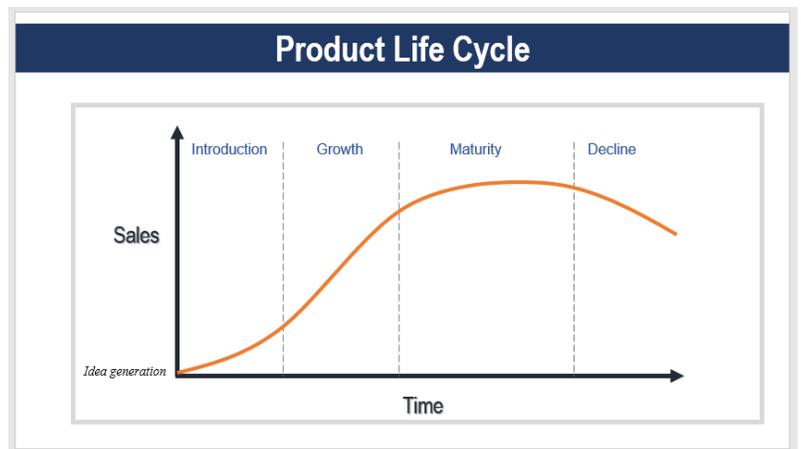
### Objective

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



## Course Logistics

### Grading and Pedagogy

This course assumes a significant degree of involvement in a synchronous online format. The learning methods are a combination of lectures, cases, guest speakers, and a team-based Shark Tank 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.

### Office Hours

Should you have any questions or concerns about the class, please contact me or our TAs.

Please feel free to email Michele Anna Klekotka ([klekotka@wharton.upenn.edu](mailto:klekotka@wharton.upenn.edu)) to arrange a mutually convenient time to speak with me.

TAs can be reached via email to arrange a meeting. They will also schedule online coffee chats.

### 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 can count as part of your participation grade.

## Assessment

### Individual Level (65%):

- Written case analysis--Nespresso 20%
- Written case analysis--Toms 10%
- The Consumer Journey Assignment 20%
- Mini assignments throughout course 10%
- Participation and postings to Canvas 5%

### Team Level (35%):

- "Shark Tank" Project 30%
- Intragroup evaluation of team members 5%

## Classroom Commitment

1. You are expected to treat fellow students with respect and are expected to sign on to class on-time.
2. Participation is of importance. We will not take attendance but we will track your in-class contributions and your postings to Canvas for relevant materials that would contribute to our understanding of the topic under discussion.
3. The use of alternative devices during class is not permitted.

## Guest Speakers

1. I will ask a student to introduce our guest speaker and then thank them at the end of the session.
2. It would be great if the class emailed to me in advance any questions that you would like the speaker to address.

## Detailed Schedule – MKTG 277

Date	Topic	Reading	Assignment
<b>IDEA GENERATION</b>			
Wednesday 9/1/21	Course Overview		<p><b>Advance Preparation Question for Sept. 8<sup>th</sup>:</b> What would you deem to be three emerging technological trends and three emerging social 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. 8<sup>th</sup> <b>(1 point)</b></p> <p>Upload your response to Canvas by 3 p.m. on Tuesday, Sept. 7<sup>th</sup>.</p>
Monday 9/6/21	No Class. Have a safe and happy Labor Day!	Rosh Hashanah 2021, sunset on 6 <sup>th</sup> until nightfall on 8 <sup>th</sup>	
Wednesday 9/8/21	Trends and Opportunities	"How Smart, Connected Products Are Transforming Competition"	<i>Team Assignments will be revealed for the Shark Tank Project</i>
Monday 9/13/21	Designing Strategies for the Future	"Blue Ocean Strategy," "Cover Feature: Our Lives in 2033,"	<p>Take a position on utopia vs. dystopia. Come to class prepared to justify.</p> <p>Also, upload to Canvas before the start of class a 250-word justification. <b>(1 point)</b></p>
Wednesday 9/15/21	New Venture Marketing <b>Guest Lecturer: Kobie Fuller (Upfront)</b>	Yom Kippur 2021, sunset on 15 <sup>th</sup> until nightfall on 16 <sup>th</sup>	
<b>MARKET INTRODUCTION</b>			
Monday 9/20/21	The Role of Marketing in Society	<b>Toms Shoes</b> Written Case Study; "Business Roundtable"	<p>See assignment instructions in syllabus.</p> <p>Upload to Canvas before class at 10:30 a.m. <b>(10 points)</b></p>
Wednesday 9/22/21	Launch of a New Concept <b>Guest Lecturer: Randy Goldberg, Bombas</b>		
Monday 9/27/21	Launch and Lifecycle Management"	"Winning the Take Off Battle"	Shark Tank Team project abstracts are due. Indicate the experience category you selected and give a brief (100-word) synopsis of project process.
Wednesday 9/29/21	Launch of a New Concept	<b>Smartick</b> Case Study	<p>Write 250-words describing the strategy that you would choose.</p> <p>Upload to Canvas by 10:30 a.m. <b>(1 point)</b></p>

**GROWTH**

Monday 10/4/21	The Future of Retailing <b>Guest Speaker: Oliver Chen (Cowen) and Steven Tristan Young (Poshmark)</b>		
Wednesday 10/6/21	Brand Management <b>Guest Speaker: Daniella Vitale (Tiffany's)</b>		Write a 250-word positioning statement comparing the Tiffany brand to Louis Vuitton, Michael Kors, and Kay Jewelers  Upload to Canvas by 10:30 a.m. <b>(1 point)</b>
Monday 10/11/21	Competitive Positioning and Challenge	<b>Ryanair Strategic Positioning (A)</b> Case Study	
Wednesday 10/13/21	<b>Disruption</b>	<b>Dollar Shave Club</b> Case Study  Individual Shark Tank Team Meetings with Tom, TAs	
Monday 10/18/21	Luxury and Fashion	"Anti-Laws of Marketing" "Conspicuous Leisure"	Refute the anti-laws of marketing. Choose three to refute and write 250-words.  Upload to Canvas before class at 10:30 a.m. <b>(1 point)</b>
Wednesday 10/20/21	Shared Consumption <b>Guest Lecturer: Beth Kaplan, Rent the Runway</b>		
Monday 10/25/21	New Avenues for Growth	<b>Rebranding Godiva: The Yildiz Strategy</b> Case Study	Write a 250-word decision on whether Godiva can be mass and <u>class</u> . <b>(1 point)</b>  Upload to Canvas by 10:30 a.m.
Wednesday 10/27/21	When Sales Stall	<b>Nespresso</b> Case Study	Written Case Analysis. See instructions in Syllabus. <b>(20 points)</b>  Upload to Canvas by 10:30 a.m.
<b>MATURITY AND TURNAROUND (OR DECLINE)</b>			
Monday 11/1/21	Brand Turnaround	<b>Case Study: Burger King</b>	On a team basis (same teams as Shark Tank), decide among the 5 positioning options and provide justification.  Upload to Canvas by Tues., Nov. 2 <sup>nd</sup> This will be shared with Fernando Machado.  Be prepared to present to Mr. Machado <b>(2 points)</b>
Wednesday 11/3/21	Brand Turnaround		

	<b>Guest Lecturer: Fernando Machado, CMO, Burger King</b>		
Monday 11/8/21	Market Defense	"Should you launch a fighter brand?"	
Wednesday 11/10/21	Segmentation and Positioning		
Monday 11/15/21	Competitor Management and Positioning	"Defensive and Offensive Strategies"	ALL TEAMS must submit a <b>draft</b> of their Shark Tank slides  Upload to Canvas prior to class.  Teams should schedule meetings directly with Prof. Robertson, or TAs.
Wednesday 11/17/21	The Consumer Journey	"Understanding Customer Experience Throughout the Customer Journey"	<u>Your Customer Journey</u> . See instructions in Syllabus.  Upload to Canvas by <u>9 a.m.</u> (not 10:30 a.m.) (20 points)
Monday 11/22/21	Shark Tank	<b>MIDTERM EXAMINATION TBD</b>  Prepare Shark Tank proposals	
Wednesday 11/24/21	No Class. Happy Thanksgiving!		
Monday 11/29/21	Omnichannel and Popups	"Pop-Ups, Ephemerality and Consumer Experience: The Centrality of Buzz,"	Write a 250-word critical analysis of the pros and cons of using popups as a marketing strategy. You can find popup examples online. (2 points)  Upload to Canvas by 10:30 a.m.
Wednesday 12/1/21	Consumer Centric <b>Guest Speaker: Hamish Taylor</b>		
Monday 12/6/21	Shark Tank Proposals	Teams present pages 3, 4, 10 and 11 of their project and offer a pitch to the class. 3 minutes w/ 2 minutes Q&A. Qualtrics survey due by Dec. 9 (Would you recommend funding? Scale 10 YES, 1 NO)	<b>Assignment: *ENTIRE CLASS*</b> ALL TEAMS must submit their slides to Canvas by <u>9 a.m.</u> (not 10:30 a.m.) on Monday, Dec. 6 <sup>th</sup> (30 points)
Wednesday 12/8/21	Shark Tank Proposals <b>Guest Shark Tank Investors: Andy Newcomb and Sunny Rao</b>		Individual evaluation of peer proposals. Submit by 5 p.m. on Dec. 8 <sup>th</sup> . (5 points)

## 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).

### **Courtney Clower, Teaching Assistant, MBA Candidate**

[bio tbd]

### **Nirma Amarakoon, Teaching Assistant, MBA Candidate**

[bio tbd]

## About the Guest Lecturers.

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.

**NOT CONFIRMED FOR 2021**

### **Kobie Fuller. Partner, Upfront**

Kobie brings to Upfront deep expertise in enterprise SAAS and emerging technologies including VR and AR. Over his career he has invested early in notable companies including Exact Target (sold to Salesforce for \$2.5B) and Oculus (sold to Facebook for \$2B). Kobie joined Upfront in June 2016 after having previously been an investor at Accel. Prior to Accel, Kobie was the Chief Marketing Officer at LA-based REVOLVE, one of the largest global fashion e-commerce players. Earlier in his career, Kobie helped found OpenView Venture Partners and was an investor at Insight Venture Partners. Kobie graduated from Harvard College.

### **Randy Goldberg. CEO, Bombas**

Randy Goldberg is the Co-Founder and Chief Brand Officer of Bombas. He is responsible for bringing the ideas, principles and story of Bombas to life. In addition, Goldberg oversees Product Design and Community & Giving at Bombas. Goldberg has been featured on NBC's TODAY Show, ABC's Shark Tank, Morning Joe, CBS This Morning, Bloomberg TV and in The New York Times. He was named the 2017 Entrepreneur of the Year by Georgetown University.

### **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.

**Steven Tristan Young, Chief Marketing Officer, Poshmark** Steven is the Chief Marketing Officer at Poshmark, the leading US Social Commerce platform. Prior to Poshmark, Steven was the VP of Growth at Grubhub, the US leading online and mobile food ordering company. During his 7-year tenure, he managed the company's customer and market level growth programs, driving double digit growth year over year. Steven has also held leadership positions at DIRECTV, American Express, Endurance International Group and Puma Sports. At American Express, Steven spearheaded the marketing efforts for the company's flagship "Centurion Card aka The Black Card" and "Platinum Card" portfolios, both the market leader in premium card marketing. Steven received his undergraduate degree from The Wharton School at the University of Pennsylvania and is an alumnus of Harvard Business School.

### **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).

### **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

## **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.

# Case Studies and Academic Readings

## Case Studies

1. Ryanair Strategic Positioning (A): July 2013. (IMD-7-1872)
2. Rebranding Godiva: The Yildiz Strategy. (HBS 9-515-059. Rev. 1/15/15)
3. Can 3G Capital Make Burger King Cool Again? (INSEAD 518-0053-1)
4. Dollar Shave Club. (LBS, CS-18-017)
5. Smartick.
6. Nespresso. IMD 5-0790. **WRITTEN CASE ANALYSIS**
7. Toms Shoes. London College of Fashion, 717-0007-1) **WRITTEN CASE ANALYSIS**
8. Understanding Customer Experience Throughout the Customer Journey
9. 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.
10. "Should You Launch a Fighter Brand?" (2009) Harvard Business Review: <https://hbr.org/2009/10/should-you-launch-a-fighter-brand> )
11. "Defensive and Offensive Strategies for Market Success" <https://www.semanticscholar.org/paper/Defensive-and-Offensive-Strategies-for-Market-Yannopoulos/48f6ab74f83f8644fc0b99a07dd21c409c12a499> )

## 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. "Business Roundtable Redefines the Purpose of a Corporation to Promote 'An Economy that Serves All Americans'" BUSINESS ROUNDTABLE, Aug. 19, 2019
5. Kuester, Sabine and Thomas Robertson (2005). "Winning the take-off battle" *European Business Forum*, Winter, Issue 20.
6. Kapferer, Jean-Noel, and Vincent Bastien (2012). "Anti-laws of marketing," *The Luxury Strategy*.
7. Veblen, Thorstein (2008). "Conspicuous Leisure," *The Theory of the Leisure Class*.

# MKTG 277 Marketing Strategy

## Due November 17<sup>th</sup> | Your Customer Journey (20 points)

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### Directions:

Take us through your journey in making a purchase. Ideally, it would be an item costing around \$20.

1. First map the total journey;
2. Discuss:
  - 1) What sources of information did you use in making the purchase and what role did each play?
    - a. Role of advertising
    - b. Role of influencers
    - c. Role of word of mouth
  - 2) How did you decide online vs. offline or did you combine both (omnichannel)?
  - 3) How important was the brand decision to you and what was the meaning of the brand to you?
  - 4) How did you determine the competitive set of brands to consider?
  - 5) Post-purchase, did you
    - a. return, or exchange and why?
    - b. post to social media?
3. List recommendations for how manufacturers/retailers could improve your purchase journey to improve your satisfaction.;
4. Upload a 1250-word paper to Canvas by 10:30 a.m. on Nov. 17<sup>th</sup>

# MKTG 277 Marketing Strategy

## Case Study Discussion Questions

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Toms Shoes (This case study will require a Written Case Analysis. 10 points)

Refer to instructions in Syllabus.

### Smartick

1. What is Smartick's concept?
2. How does it fit in the competitive set with Khan Academy, Kumon, et al?;
3. Consider the DMU (decision making unit) and DMP (decision making process) for B-to-B and B-to-C
4. Contrast the B-to-B and B-to-C strategic alternatives;
5. What strategy would you pursue?

### 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 market segmented?
3. Contrast the Lindt strategy to the Godiva strategy.
4. What brand positioning should Godiva pursue?
5. What channel strategy do you recommend?
6. Can they be both class and mass?

### Burger King

1. What positioning has Burger King used in the past?
2. How is the QSR industry evolving?
3. How does BK compare to competition especially McDonalds?
4. Who should be BK's target market?
5. Which of the five positioning options would you choose?
6. How should marketing dollars be allocated among TV commercials, digital campaigns and PR and brand design/packaging/logo?

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## 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?

Nespresso (This case study will require a Written Case Analysis. 20 points)

Refer to instructions in Syllabus.

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# MKTG 277 Marketing Strategy

## Written Case Analysis—Toms (10 points)

### Directions

1. Analyze the Toms case study.
2. Submit the analysis via Canvas before 10:30 a.m. on Monday, Sept. 20<sup>th</sup>;
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 2 points.

### Structure

1. Articulation of Toms concept
2. Is it ethical for Toms to make profits by engaging in charitable acts?
3. Is what Toms is doing different then Warby Parker?
4. What should Toms do going forward?
5. Use course concepts as appropriate
6. Two (2) exhibits maximum (Exhibits are optional)

### Guidelines

- This is not a research paper; it is an analysis of a real business situation;
- Ignore what is referred to as the “second question”

### Grading Rubric

Topic	Criteria	Points Possible	Score
Problem presentation	Clearly articulates Toms’ value proposition and summarizes the challenge faced	2	
Probes	Probes the ethics of shoe giveaways	2	
Strategic options	Articulates strategic options and pros/cons of each	2	
Decision and rationale	Clearly elaborates recommended decision, provides justification through supporting case and course concepts	2	
Presentation	Arguments are coherent and convey depth of analysis; exhibits (if any) support and enhance arguments	2	
	<b>TOTAL</b>	<b>10</b>	

# MKTG 277 Marketing Strategy

## Written Case Analysis—Nespresso (20 points)

### Directions

1. Analyze the Nespresso case study.
2. Submit the analysis via Canvas before 10:30 a.m. on Wednesday, Oct. 27<sup>th</sup>
3. Limit 1000 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.

### Structure

1. Articulation of Nespresso concept
2. Which of the five strategic options would you recommend?
3. List the pros and cons of each
4. Identify the risks and limitations of your strategic choice
5. Use course concepts as appropriate
6. Two (2) exhibits maximum (Exhibits are optional)
7. Severely limit repeating case facts

### 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

Topic	Criteria	Points Possible	Score
Problem presentation	Clearly articulates Nespresso's value proposition and summarizes the challenge Nestle faces	5	
Strategic options	Articulates strategic options and pros/cons of each	5	
Decision and rationale	Clearly elaborates recommended decision, 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	2	
	<b>TOTAL</b>	<b>20</b>	



# MKTG 277 Marketing Strategy

## How to Analyze a Case Study

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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

'Shark Tank' Team Project Proposal (30 points)

## Team Responsibilities

Study the customer experience within one of the following product categories: streaming, online sports, renting, resale, sustainability

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- 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 (14 slides only—no written paper)

Slide 1	Map the customer journey 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	Estimate your costs
Slide 11	Estimate your breakeven
Slide 12	State your revenue objective and how derived
Slide 13	How much money will you have to raise and what percentage of your equity are you willing to give away?
Slide 14	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. 15<sup>th</sup> at 9 a.m.
2. **ALL TEAMS:** Submit your **final** proposal by 9 a.m. on Monday, Dec. 6<sup>th</sup>.
3. Maximum length is 14 readable slides.

## Assessment (30 points)

- 20 points. valuation of the 14 slides as to their, rigor, logic, creativity and use of course concepts. This evaluation will be conducted by Professor Robertson and the TAs.
- 5 points. Your peers will vote as to whether they would recommend funding
- 5 points. The invited investors will vote as to whether they would recommend funding.