Rotman Commerce
UNIVERSITY OF TORONTO

Course Outline

RSM250H1S (Sections L0601, L0701)
Principles of Marketing, Spring 2019

Classes Meet:

- Section L0601, Friday 1-3pm, RT LL1030[1]
- Section L0701, Friday 3-5pm, RT LL1030

*Lectures begin 10 minutes past the hour and end on the hour (duration: 1 hour 50 minutes)

Instructor:	Professor Claire Iwen Tsai | RT566
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Phone:	416-946-3128
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Webpage:	https://q.utoronto.ca/
Office Hours:	Wednesday 12-1pm (feel free to bring lunch) Friday 5-6pm For other times, please email to schedule a time. Wednesday afternoon is usually good. Friday 9am-5pm is not possible because of other classes
Teaching Assistant:	Ming Ma | Michael Reardon | Enning Zhang | RSM250.L67.2019@gmail.com

Course Administration Issues

- ***PUNCTUALITY!*** Arrive a few minutes early and stay until the end of the class. Students who arrive late and/or leave early repeatedly will definitely receive zero or negative mark for class participation.
- Actively participate in every in-class exercise.
- No-Internet/WiFi/phone policy. Students may use computers or tablets to take notes but are not allowed to use their phones or browse Internet using any electronic device. Repeated violation of this rule will definitely result in zero or negative mark for class participation.
- After week 2, sit in the same seat throughout the semester.
- Bring your name tent to each class otherwise class participation may not be recorded.

[1] **On Feb 8, we meet in LL1035. L601 will start at 1:15pm. LL1035 is on the same floor as the usual classroom.**

- Make sure that you have access to Quercus (https://q.utoronto.ca/) and that your email address is recorded correctly in Quercus. All lecture notes and announcements will be posted online. For more detailed instructions on how to access Quercus, see "POLICY AND PROCEDURE."
- For questions related to course administration: (1) read course outline and (2) ask TA.
- In your emails to TA and instructor, state your name and section number.

Course Scope and Mission

This course is designed to introduce you to the key principles of marketing. After taking the course,
(1). you will speak intelligently about marketing observations (new product, price changes, social media);
(2). you can design marketing solutions to satisfy specific customer needs;
(3). you will understand the value of marketing to the society.

Course Co-requisite: RSM100H1/MGT100H1/RSM100Y1. If you drop the co-requisite course during the academic term, you must also drop this course. Contact Rotman Commerce Academic Program Services for academic advising if needed.

Required Readings

Required Online Course Packet. All Harvard course material can be purchased by accessing the Harvard Business School Publishing website (https://hbsp.harvard.edu/import/593488).

Additional course resources including announcements, case material, required readings, lecture notes, handouts, and links to relevant websites are available on Quercus. You must log in to this website before the first class and regularly during the course in order to access required reading and case material.

Course Package includes the following contents:

1. "Marketing Myopia," by Theodore Levitt (2004), HBR # R0407L.
2. "Marketing Research," by Fareena Sultan (1991), HBS #9-592-013.
3. "Market Segmentation, Target Market Selection, and Positioning," by Miklos Savary and Anita Elberse (2006), HBS #9-506-019.
4. "Brand Positioning Statements," by Gerry Yemen and Ronald Wilcox (2012), UV5792, Darden Business Publishing, University of Virginia.
5. "Principles of Product Policy," by Anita Elberse (2006), HBS #9-506-018.
6. "Marketing Communications," by Thales Teixeira (2012), HBS #9-513-041.
7. "Understanding Brands," by Anat Keinan and Jill Avery, HBS #9-509-041.
8. "Principles of Pricing," by Robert J. Dolan and John. T. Gourville (2009), HBS #9-506-021.
9. "Going to market," by R Dolan (2000), HBS #9-599-078.

Cases

1. "Ikea Invades America," by Youngme Moon (2004), HBS Case #9-504-094.
2. "Calyx Flowers: Managing Profitable Growth," by Alexander Chernev (2013), Kellogg School of Management (available on Quercus).
3. "Apple Watch" by Claire Tsai and Joel Navarathinam (2017), Rotman School of Management (available on Quercus).
4. "Lululemon Athletica," by Alice Tybout (2017), HBS Case #KE1010.

Recommended Readings.

Supplementary materials about digital marketing are available on Quercus. Although you will NOT be tested on these materials, they help you apply the foundation concepts in the required reading in a contemporary context and stay abreast of new marketing trends and events. I recommend one article/video per week. HBR = Harvard Business Review

1. "The Boycott That Wasn't: How United Weathered a Media Firestorm," by James Stewart (2017), NY Times
2. "Use Big Data to Create Value for Customers, Not Just Target Them," by Niraj Dawar (2016), HBR
3. "Don't Let Big Data Bury Your Brand," by Peter Horst and Robert S. Duboff (2015), HBR
4. "What are brands for?" The Economist – Marketing (2014)
5. "Want to Upgrade Your In-Store Experience?" by John McAteer (2018), Think with Google, Omnichannel
6. "Brand Building in a Digital Age," by John Battelle (2012), Think with Google
7. "Brand Building in a Digital Age," by Gareth Kay (2012), Think with Google
8. "The Challenge of the Global Brand," by Hayes Roth (2008)
9. "The Big Data Boom Is the Innovation Story of Our Time," by Erik Brynjolfsson and Andrew McAfee (2011)
10. "The Emerging Brand Battle," by Schumpeter (2013), The Economist
11. "The Best Way to Name Your Product 2.0," by Marco Bertini, John Gourville, and Elie Ofek (2011), HBR

Although there is no required text for this course, you will find it very helpful to have access to at least one marketing management textbook.

- Peter, J. P. & Donnelley, J., Jr. (2012). *A Preface to Marketing Management, Thirteenth Edition*, McGraw-Hill Ryerson.
- Kotler, P., Keller, K. L. & Cunningham, P. H. (2008). *A Framework for Marketing Management, First Canadian Edition,* Prentice Hall.
- Kotler, P., Keller, K. L., Cunningham, P. H., & Sivaramakrishnan, S. (2012). *Marketing Management, Fourteenth Canadian Edition*, Pearson Education Canada.

Learning Activities, Evaluation, and Grades

Each student shall be judged on the basis of how well he or she has command of the course materials. Note that some of the questions you will be asked do not have a specific right answer; therefore, some of the grading is necessarily subjective.

	Weight	Due Date
1. Class Participation	10%	Ongoing***
2. Research Requirement	3%	see "Research Requirement" below
3. Group Case Report Group Case Presentation Material	12%	Mar 22 Mar 29
4. Group Case Presentation	5%	Last 2 classes
5. Midterm Exam	30%	March 1
6. Final Exam	40%	Final Exam Period
Total	100%	

Students may be required to submit their Group Case Report to www.turnitin.com for a review of textual similarity and detection of possible plagiarism. In doing so, students will allow their essays to be included as source documents in the Turnitin.com reference database, where they will be used solely for the purpose of detecting plagiarism. The terms that apply to the university's use of the Turnitin.com service are described on the Turnitin.com website.

1. Class Participation

By default, every student will receive 6 (out of 10) points for class participation. If you make significant contributions to class discussions, you may receive more than 6 points. On the other hand, you will receive fewer than 6 points if you (1) do not attend all the classes and all the presentations, (2) arrive late on a regular basis, (3) do not actively participate in class discussions and presentations, (4) consistently make non-constructive comments, or (5) consistently disrupt the class by using the Internet, texting, or making a disruptive entrance when arriving late. If you must arrive late for reasons beyond your control, please enter the classroom quietly and be seated quickly.

The following questions will be considered in grading participation:

- Does the student arrive promptly for class and participate in discussions? Do the questions and comments move the discussion forward and contribute to a learning environment?

- Is the student prepared to report facts, analyses, and conclusions? Do comments interpret and integrate case facts using marketing theories, concepts, and analytical tools?

- Does the student take a defensible position on his/her recommended course of action? Are the arguments and answers to questions persuasive?

- Is the student able to communicate effectively? Are comments presented in a concise, compelling, and convincing manner?

- Does the student listen to other comments? Is the student able to build upon and evaluate other comments? Does the student learn from and show respect for other speakers and their points of view?

- Finally, and very important, does the student actively participate in every in-class exercise?

In order to facilitate your participation, especially for case discussion, it may be useful to prepare a one-page summary of your major analyses and conclusions. This summary can be a useful memory cue at the time of discussion and during later review of the material. See Appendix for more information.

***Bonus Points

From time to time, I may ask you to do an extra exercise or complete an extra questionnaire in class or after class, and I will give you a few bonus points. I may do this a few times in the semester without advance notice. If you miss the class, you miss the credit. For example, photobook survey (due at 9am, Jan 11) is worth 0.5 credit, and brand test tastes collectively are worth 1.5 credits. More information to follow in class.

2. RSM Study Participation Assignment (for 3-Credit Requiring Courses)

Assignment Timeline & Important Deadlines. You must complete 3-credit-hours' worth of studies to fulfill your research participation requirement in this course. Participation opportunities in research studies for the Winter 2019 session are anticipated to begin the academic week starting, **Monday, January 7, 2019**. The final study participation deadline, and last day to submit an article analysis, is **Friday, April 5, 2019** at 5 pm. If you have any trouble with registration, questions the subject guide or SONA FAQ do not clarify, or need any further assistance, please contact Team BRL: Behavioural.Lab@Rotman.Utoronto.ca, and we will be happy to assist you!

Participation. To participate in a research study, you will be using the Rotman Behavioural Lab (BRL) Sona participation website: https://rotman.sona-systems.com. You should have had a BRL Study Pool Sona account created (or, updated) for you, with a username that matches your UTORID, and either the email you registered for courses with (for new users), or your (now) UofT email for returning users. New users should check their emails for a link to complete registration. If you registered for a course late, or using a non-UofT email you no longer have access to, please, contact Team BRL for assistance.

You have been pre-registered for all of your RSM credit pool participating courses this term. Please, check your enrollment (especially, section numbers) carefully. If you have already added or dropped credit participating courses, or do so later in the semester, you can (and, should) update your Sona roster using the "Change Courses" feature under the "Credit-Hours" section of your "My Profile" page.

After logging in, Sona, you can find a list of studies currently running at the BRL via the "Studies" tab. Read the study descriptions carefully: most studies take place in the lower level of the Rotman building in the Behavioural Research Lab (LL1015K), but others may run online, or in another physical location. Once you identify a study you are interested in participating in, select an open time slot that works with your schedule, and choose which course you want the study credit applied to on the final registration screen.

Participation in the actual research will take between 45 and 60 minutes for a 1 credit study or between 15 and 30 minutes for a 0.5 credit study. You will be debriefed at the end of the study, and you will be asked to answer a question about some aspect of the study. Once you correctly answer the question you will be given credit. More detailed instructions on the assignment, and using the Sona system can be found in your Subject Participation Guide.

Analysis of Article. Although, we highly encourage you fulfill your participation requirement through research study participation, you may also elect to earn research credits through completion of article analyses. These analyses must be based on research articles from designated journals dependent on your class, and are graded on a pass/fail basis. Article analyses are worth 1-credit-hour of participation. To submit an article analysis, sign up for any open time slot on the "Alternative Study Participation Article Analysis Assignment" found on the Sona studies page (you will be asked to fill out the details of the article you are reporting on, and upload a word document). For detailed information on the article analysis assignment, including instructions on properly submitting the analysis to ensure credit is received, please, refer to your Subject Participation Guide, or the FAQ on Sona. To earn full participation doing only the alternative assignment, you would need to write 3 article analyses for this course.

3. Group Case Report

The purpose of this project is for you to apply the knowledge learned in class to real-world marketing problems. You will follow a case analysis template in the Appendix. When discussing your case, keep in mind that both creativity and the actual problem solution matter.

The case is Lululemon Athletica. You must work in groups of 3-4 students for this project. (4 students per group is strongly and highly recommended, given the amount of work and the uncertainty of your group members' enrollment in the semester.) All group members in each group must be in the same section. You have to submit your group/members and your case preference **by Feb 1** using a google doc (available on Quercus under "Modules"). Students who have not formed a group by **Feb 1** will be assigned to a group by the TA. Thereafter, students will not be able to switch groups. Similarly, groups that have not chosen a case will be assigned to a case by the TA. Thereafter, groups will not be able to switch cases.

Please note that clear, concise, and correct writing will be considered in the evaluation of the case discussion paper. That is, you may lose points for writing that impedes communication: poor organization, weak paragraph development, excessive wordiness, hard-to-follow sentence structure, spelling mistakes and grammatical errors. Students who require additional support and/or tutoring with respect to their writing skills are encouraged to visit the Academic Success Centre (www.asc.utoronto.ca) or one of the College Writing Centres (www.writing.utoronto.ca/writing-centres). These centres are teaching facilities – not editing services, where trained staff can assist students in developing their academic writing skills. There is no charge for the instruction and support.

- **Group case report (in PDF file) is due by 9am on Mar 22. Group case presentation (PowerPoint/PDF) is due by 9am on Mar 29.** A penalty of 40%-100% will apply to late assignments (for details, see "Late Assignments" under Policy and Procedure) and this policy will be strictly reinforced. I strongly encourage you to aim at finishing the final write-up one week before the deadline. No hard copy is required.

Name the file using this format:

RSM250Section-GroupName, e.g. RSM250L701-GroupVine

The cover page of the report and the first slide of the presentation should include: (1) **group name and (2) UofT student ID numbers**. Do not put your name on the written assignments.

The grade for the group presentations will be based on a process of peer evaluation (inter-group) that will be explained later by the professor. See Appendix for the evaluation criteria for the presentation.

- **Peer-evaluation**. Peer-evaluation of group participation/contribution will be conducted twice in class; after the submission of the report and the Group Presentation, respectively. Inadequate contribution will result in deductions of your individual final grades, and the amount of deduction is at the discretion of the professor. Forms will be supplied at the beginning of the class and participants are requested to complete them by the end of the class. These forms will be used as basis for evaluation; however, we expect that almost every student in the class will get full marks for group participation/contribution. A secondary role of these forms is to identify group dynamics problems so that they can be managed before they start affecting team performance. 20% will be deducted from the grade for group assignment for anyone who fails to submit any of the peer reviews.

Peer evaluation is strictly confidential. Do not ask others to show you their evaluations or reveal yours to others. Failing to comply will result in as much as 20% deduction from the grade for the project.

4. Group Case Presentation

Each group has to present its case analysis in front of the entire class on Mar 29 or Apr 5, depending on case selection. Each group member has to participate in the presentation. Everyone must attend all the presentations and be prepared to participate in Q&A. You will be tested on the case in the final exam. The time allocation of each presentation is 12 minutes + 3 minutes for Q&A. The presentation—a PowerPoint file or a PDF version— must be submitted to Quercus by **9am on Mar 29**.

Group Work

Learning to work together in teams is an important aspect of your education and preparation for your future careers. That said, project-based teamwork is often new to students and you are therefore reminded of the following expectations with respect to behaviour and contributions to your team project.

1. Read the document entitled, "Working in Teams: Guidelines for Rotman Commerce Students" which is available on the RC portal under the Academic Services tab.

2. When working in a team, Rotman Commerce students are expected to:

- Treat other members with courtesy and respect;
- Honour the ground rules established by the team;
- Contribute substantially and proportionally to the final project;
- Ensure enough familiarity with the entire contents of the group project/assignment so as to be able to sign off on it as original work;
- Meet the project timeline as established by the team.

3. Resolving differences:
Conflicts can – and do – occur. Conflicts are part of the team's process of learning how to work together effectively and can actually generate exciting debate and creative solutions – if managed appropriately.

Student teams are collectively expected to resolve disputes or misunderstandings as soon as they arise (and prior to submission of the final project). In cases where teams are unable to reach a mutually agreeable solution, the entire team must meet with the Rotman Commerce Team Coach** as soon as possible. The Coach will listen to the team and help develop options for improving the team process. All members of the project team must commit to, and, utilize their action plans.

** The Rotman Commerce Team Coach, Nouman Ashraf, may be reached at nouman.ashraf@rotman.utoronto.ca for an appointment. Nouman is highly skilled at facilitating team dynamics and collaboration. Note that the Team Coach's s role is to provide guidance, support and advice on team matters – not to formally evaluate or assess teamwork for academic purposes.

5. Mid-Term and Final Examination

These will be closed book tests that cover material from the lectures, cases, and assigned readings in the course packet. Both exams may consist of multiple choice questions, short-answer and essay questions. The exams will be based not only on assigned readings but also on material discussed in class but not covered in the readings. **Midterm exam will be held on Mar 1 for both sections in Galbraith Building (GB) room 405** and will cover materials up to the **IKEA case**. Final exam will be held during the final examination period. Final exam will be cumulative (cover the content of the entire semester).

Tentative Weekly Schedule

Week	Date	Topic, Cases, Readings, and Assignments
1	Jan 11	**Introduction to Marketing** Readings: Course Outline; Marketing Myopia **Bonus task (0.5 credit): Fill out photobook by 9am*
2	Jan 18	**Marketing Research and Segmentation, Targeting, and Positioning** Readings: Marketing Research; Market Segmentation, Target Selection, and Positioning
3	Jan 25	**Segmentation, Targeting, and Positioning** Readings: Brand Positioning Statements Case: Calyx Flowers
4	Feb 1	**Product Policy** Readings: Principles of Product Policy Case: Ikea Invades America *Deliverable: Fill out Google doc (Quercus) for group work*
5	Feb 8	**Guest Speaker: Nerms @ Google**
6	Feb 15	**Tutorial**
	Feb 22	**No Class (Reading Week)**
7	Mar 1	**No Class (Midterm | Galbraith Building 405 | 18:00-19:30)**
8	Mar 8	**Branding Strategy and Marketing Communications** Field Trip to Eaton Center (more information to follow) Case: Apple Watch (read before the field trip)
9	Mar 15	**Branding Strategy and Marketing Communications (continued)** Readings: Understanding Brands and Marketing Communications Case: Apple Watch (in-class discussion) **Bonus task (2 credits): Submit the field trip summary by 9am*
10	Mar 22	**Pricing Strategy** Readings: Principles of Pricing and Going to Market *Deliverable: Submit case report by 9am, peer evaluation #1 in class*
11	Mar 29	**Presentation I: Lululemon Athletica** *Deliverable: Submit presentation by 9am (both sessions)*
12	Apr 5	**Presentation II: Lululemon Athletica** *Deliverable: peer evaluation #2 in class (both sessions)*
FINAL EXAM: Scheduled by Registrar's Office		

POLICY AND PROCEDURE

Missed Tests and Assignments (including midterm examinations)

Students who miss a test or assignment for reasons entirely beyond their control (e.g. illness) may submit a request for special consideration. Provided that notification and documentation are provided in a timely manner, and that the request is subsequently approved, no academic penalty will be applied.

In such cases, students must notify Rotman Commerce on the date of the missed test (or due date in the case of course work) and submit supporting documentation (e.g. Verification of Student Illness or Injury form) to the Rotman Commerce Program Office within **2 business days** of the originally scheduled test or due date. Students who do not provide Rotman Commerce or the instructor with appropriate or sufficient supporting documentation will be given a grade of 0 (zero) for the missed test or course deliverable.

Documentation submitted in support of petitions for missing tests and assignments must be original; no faxed or scanned copies will be accepted.

Note that the physician's report must establish that the patient was examined and diagnosed at the time of illness, not after the fact. Rotman Commerce will not accept a statement that merely confirms a later report of illness made by the student to a physician.

There will be no make-up midterm test. If the documentation is satisfactory, the weight of the midterm test will be moved to the final exam (i.e., the final exam will carry 70% instead of 40%). Otherwise the student will receive zero for the midterm exam.

Late Assignments

All assignments are due on the date and at the time specified in the course outline. Late submissions will be penalized by 40% if the assignments are not received on the specified date, at the specified time. A further penalty of 30% will be applied to each subsequent day. Students who, for reasons beyond their control, are unable to submit an assignment by its deadline must obtain approval from the instructor for an extension. Supporting documentation will be required as per the policy on missed tests and assignments.

Accessibility Needs

The University of Toronto is committed to accessibility. If you require accommodations for a disability, or have any accessibility concerns about the course, the classroom or course materials, please contact Accessibility Services as soon as possible: accessibility.services@utoronto.ca or http://www.studentlife.utoronto.ca/as.

Academic Integrity

Academic Integrity is a fundamental value essential to the pursuit of learning and scholarships at the University of Toronto. Participating honestly, respectively, responsibly, and fairly in this academic community ensures that the UofT degree that you earn will continue to be valued and respected as a true signifier of a student's individual work and academic achievement. As a result, the University treats cases of academic misconduct very seriously.

The University of Toronto's Code of Behaviour on Academic Matters http://www.governingcouncil.utoronto.ca/policies/behaveac.htm outlines the behaviours that constitute academic misconduct, the process for addressing academic offences, and the penalties that may be imposed. You are expected to be familiar with the contents of this document. Potential offences include, but are not limited to:

In papers and assignments:

- Using someone else's ideas or words without appropriate acknowledgement.
- Submitting your own work in more than one course without the permission of the instructor.
- Making up sources or facts.
- Obtaining or providing unauthorized assistance on any assignment (this includes collaborating with others on assignments that are supposed to be completed individually).

On test and exams:

- Using or possessing any unauthorized aid, including a cell phone.
- Looking at someone else's answers
- Misrepresenting your identity.
- Submitting an altered test for re-grading.

Misrepresentation:

- Falsifying institutional documents or grades.
- Falsifying or altering any documentation required by the University, including (but not limited to), medical notes.

All suspected cases of academic dishonesty will be investigated by the following procedures outlined in the *Code of Behaviour on Academic Matters.* If you have any question about what is or is not permitted in the course, please do not hesitate to contact the course instructor. If you have any questions about appropriate research and citation methods, you are expected to seek out additional information from the instructor or other UofT resources such as College Writing Centres or the Academic Success Centre.

Email

At times, the course instructor may decide to communicate important course information by email. As such, all UofT students are required to have a valid UTmail+ email address. You are responsible for ensuring that your UTmail+ email address is set up AND properly entered on the ACORN system. For more information please visit http://help.ic.utoronto.ca/category/3/utmail.html

Forwarding your utoronto.ca email to a Hotmail, Gmail, Yahoo or other type of email account is not advisable. In some cases, messages from utoronto.ca addresses sent to Hotmail, Gmail or Yahoo accounts are filtered as junk mail, which means that important messages from your course instructor may end up in your spam or junk mail folder.

Quercus and the Course Page

The online course page for this course is accessed through Quercus. To access the course page, go to q.utoronto.ca and log in using your UTORid and password. Once you have logged in, you will be at the

Quercus Dashboard. On this page you will see all of the courses you are presently enrolled in. If you don’t see the course listed here but you are properly registered for the course in ACORN, wait 48 hours.

Recording Lectures
Lectures and course materials prepared by the instructor are considered by the University to be an instructor’s intellectual property covered by the Canadian Copyright Act. Students wishing to record a lecture or other course material in any way are required to ask the instructor’s explicit permission, and may not do so unless permission is granted (note: students who have been previously granted permission to record lectures as an accommodation for a disability are, of course, excepted). This includes tape recording, filming, photographing PowerPoint slides, Blackboard materials, etc.

If permission is granted by the instructor (or via Accessibility Services), it is intended for the individual student’s own study purposes and does not include permission to “publish” them in anyway. It is absolutely forbidden for a student to publish an instructor’s notes to a website or sell them in any other form without formal permission.

Appendix

How to Prepare for Case Analysis? – A General Guideline

Step 1. Read the first page and the last page of case, and answer following questions:

1. Is there a decision maker I need to identify with? Who is this person (name, position, responsibilities)?
2. What decision do I have to make and is it significant to the company?
3. How did the problem arise and why am I involved?
4. When do I have to make the decision – is it urgent?

Step 2. Go to the end of case and take a <u>quick look</u> at the exhibits. What types of information are available in these exhibits?

Step 3. Read the case very carefully, and answer the <u>following questions</u>.

1. What is the company and what product or service do they sell?
2. How would you describe the value that they create for their customers? Is it mainly economic, functional, emotional, or experiential?
3. Who are they competing with? (Think about direct as well as indirect competitors)
4. How should the market be segmented? What is the most appropriate target segment for this product/service?
5. Write down a brand positioning statement.
6. How do consumers make decisions in this product category? Which aspect of consumer behavior do you think the company needs to change?
7. In a sentence or two, describe this company's (a) product strategy, (b) promotion (communication) strategy, (c) distribution strategy, and (d) pricing strategy.

<u>Note</u>:

- Keep notes of your answers for the above questions.
- Try making use of the facts available in the case, including exhibits.

Step 4. Summary analysis

8. What is the key decision that needs to be made in this case analysis? What are the alternative course of actions, strategies? What criteria will you use to make the decision?
9. What are the implications of your analysis in (1) - (7) to above decision? Present your analysis and implications in a summary table, and make a recommendation.

Guidelines for Group Case Reports (Lululemon Athletica)

<u>Format:</u> Case report should be *double-spaced, with margins* no smaller than 1 inch, font size 12 pts. Reports should be ***no more than 15 pages long, including all*** **figures and tables**.

Report Structure: your report should consist of following 4 parts, **% indicates weights in grading**.

<u>1. Problem definition</u>: (10%) In this part, you may describe the situation facing the company, the company's goals and challenges, and identify the main decision(s) the company needs to make. In case the company faces several problems, you may focus on the *most important one(s)*, and the one(s) that the case provide sufficient information for your analysis.

<u>2. Alternatives</u>: (15%) In this part, you present a list of ***best alternative***, NOT all alternatives.

- The alternatives are competing approaches, strategies, or course of actions that are *significantly different from each other*.
- The alternatives should be as fully specified in order to be adequately evaluated. This requires you to think through all aspects of each alternative.
- ***No more than 4 alternatives*** for meaningful discussions.
- Avoid (a) "wait for more research" type of alternative, and (b) alternatives that have little information in the case (you then need to rely on wild guesses).

<u>3. Critical Analysis</u>: (40%) This part evaluates the causal factors affecting alternative success.

- What criteria will you use to compare the alternatives?
- Go back to questions (1) - (7) in "how to prepare for case analysis?" on previous page. What are the implications of your answers to the evaluation of alternatives?
- Organize "critical analysis" into a small number of subsections.

<u>4. Conclusion</u>: (25%) This part integrates your critical analysis and shows how one alternative is better than another (or all others) according to your analysis. This part is related to your answer to question (9) in "how to prepare for case analysis?"

Notes:
- <u>Remaining 10% for writing clarity and cohesiveness</u>.
- No need to include a reference section for materials you cited <u>*from the case*</u>.
- Make an easy-to-read project. It is hard to follow when poorly formatted or too long. This problem is easily fixed by improving the flow of your project and following the page limit. Proofread.
- **Do not simply merge sections written by different members of a group.** Make sure that the project does not reflect misunderstandings and disagreements among group members. It is fine to "divide labor" to some extent, but it works only when your group members share an overall marketing direction, detailed marketing actions, and the central elements of the logical argument. Otherwise, the project will not form a coherent logic or concerted plan of action.
- Suggested structure for your case report: Cover page, "Table of contents" page, main report (including 4 sections, no more than 15 pages, numbered). All tables and figures can be placed either in the end or in the main document. Either way they need to be numbered, e.g., Table 1, 2, .., Figure 1, 2., ..as they should be referred to in the main report, e.g. "we have conducted financial analysis for this option in Table 3…According to the results in Table 3, the firm…". Tables/figures count towards the 15-page limit.

- The cover page of the report should include: (1) **group name and (2) UofT student ID numbers**. Do not put your name on the written assignments.

Guidelines for Group Case Presentation

- Your presentation must cover all **four** parts: problem definition, alternatives, critical analysis, and conclusion.
- Each group member must participate in the presentation.
- Use powerpoint or any other commonly used presentation media, e.g., Prezi
- The first slide should include: (1) **group name and (2) UofT student ID numbers**. Do not put your name on the written assignments.

Time limit: 12 minutes + 3 minutes

Grading: Your presentation will be graded *using the following matrix*

Completeness (cover all four parts)	0 (No)	1 (Somewhat)	2 (Complete)
Key Message Conveyed (application of course materials)?	0 (No)	1 (Somewhat)	2 (Very Well)
Style: Delivery and Poise (quality of slides and presentation)	0 (Poor)	1 (OK)	2 (Exceptional)
Creative Execution of Presentation (fun, energy, enthusiasm)	0 (Poor)	1 (OK)	2 (Superior)
Best / most effective use of time?	0 (Poor)	1 (OK)	2 (Superior)
Questions handled well? Interesting comments provoked?	0 (No)	1 (Somewhat)	2 (Very Well)

Total Score: __________________(out of 12)

Case Preparation Questions for Calyx Flowers

Step 1. Read first paragraph on first page, and last page of case, and answer following questions:

1. Is there a decision maker I need to identify with? Who is this person (name, position, responsibilities)?
2. What decision do I have to make and is it significant to the company?
3. How did the problem arise and why am I involved?
4. When do I have to make the decision – is it urgent?

Step 2. Go to the end of case and take a <u>quick look</u> at the exhibit.

- What types of information are available in the exhibit?

Step 3. Read the case very carefully, and answer the <u>following questions</u>.

1. What is the company and what product or service do they sell?
2. How would you describe the value that they create for their customers? Is it mainly economic, functional, emotional, or experiential?
3. Who are they competing with? (Think about direct as well as indirect competitors, if applicable)
4. How should the market be segmented? What is the most appropriate target segment for this product/service?
5. Write down a brand positioning statement.
6. How do consumers make decisions in this product category? Which aspect of consumer behavior do you think the company needs to change?
7. In a sentence or two, describe this company's: (a) product strategy, (b) promotion (communication) strategy, (c) distribution strategy, and (d) pricing strategy

<u>Note</u>:

- Keep notes of your answers for above questions;
- Try making use of all the facts available in the case, including exhibits.

Step 4. Summary analysis

8. What is the key decision that needs to be made in this case analysis? What are the alternatives? What criteria will you use to make the decision?
9. What are the implications of your analysis in (1) - (7) to above decision? Present your analysis and implications in a summary table, and make a recommendation.

Case Preparation Questions for IKEA Invades America

Step 1. Read first paragraph on first page, and last page of case, and answer following questions:

5. Is there a decision maker I need to identify with? Who is this person (name, position, responsibilities)?
6. What decision do I have to make and is it significant to the company?
7. How did the problem arise and why am I involved?
8. When do I have to make the decision – is it urgent?

Step 2. Go to the end of case and take a <u>quick look</u> at all 9 exhibits.

- What types of information are available in these exhibits?

Step 3. Read the case very carefully, and answer the <u>following questions</u>.

10. What is the company and what product or service do they sell?
11. How would you describe the value that they create for their customers? Is it mainly economic, functional, emotional, or experiential?
12. Who are they competing with? (Think about direct as well as indirect competitors)
13. How should the market be segmented? What is the most appropriate target segment for this product/service?
14. Write down a brand positioning statement.
15. How do consumers make decisions in this product category? Which aspect of consumer behavior do you think the company needs to change?
16. In a sentence or two, describe this company's: (a) product strategy, (b) promotion (communication) strategy, (c) distribution strategy, and (d) pricing strategy

    <u>Note</u>:

- Keep notes of your answers for above questions;
- Try making use of all the facts available in the case, including exhibits.

Step 4. Summary analysis

17. What is the key decision that needs to be made in this case analysis? What are the alternatives? What criteria will you use to make the decision?
18. What are the implications of your analysis in (1) - (7) to above decision? Present your analysis and implications in a summary table, and make a recommendation

Case Preparation Questions for Apple Watch

Repeat the procedure from IKEA. Consider the following specific questions.

Apple Products

1. What, historically, have been Apple's strengths and weaknesses?
2. Who are the customers? How might they differ by Apple's product lines – PC, digital music, smartphones, and tablets? How might (or should) the differences influence Apple's Marcom strategy? Consider how customers shop for PCs in general and how their purchase behaviors change over time. The segments include home, small and medium-sized business, corporate, education, and government.
3. What might be the role of Apple's Marcom strategy in these product lines?

Apple Watch

4. Timing, secrecy, cross-platforms have been some of the noticeable characteristics of Apple Watch's Marcom strategy. What other characteristics did you notice?
5. Describe the strengths and weaknesses of Apple Watch's Marcom strategy.
6. Why has the adoption rate of Apple Watch remained low since the launch (why hasn't Apple Watch been adopted by the mass market)?
7. How would you recommend that Apple revise their SMC to better promote Apple Watch?