Course Outline

RSM458H1S L101
Branding Strategy
Winter 2017
Course Meets: Thu 4-6pm WO30

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COURSE SCOPE AND MISSION

Great brands stand for many different things in the minds of customers. However, they all succeed in generating consumer interest, loyalty, even passion… and enormous value for the companies that manage them.

Our focus is on strategic and creative management of brands. We will examine how innovative managers create brands that connect with customers by studying customer lifestyles, tapping into cultural meanings, managing customer experiences, and executing brand strategies across touchpoints—from naming and visual identity to advertising, new media, retail, packaging, product innovation, and service. We will also touch upon brand valuation and analytics, but these topics are covered in more depth in other classes.

Class sessions will combine lectures, case studies, and group exercises. The course will be providing an integrated brand-management model based on the 3C-STP-4P Marketing Strategy framework. The concepts and tools of the model involved brand identity, brand equity, planning/portfolio, experience, execution and they will be presented and discussed in various class session. Students should apply the model as part of their final group presentation.

Students are evaluated for their ability to master new concepts, think strategically, and generate truly creative solutions to everyday branding challenges. In order to benefit from and contribute to each class session, it is essential to read and prepare all required material for that session in advance. The classes are typically very interactive, and the value of the discussions will be closely related to your level of preparation. Developing sound marketing judgement requires that students learn to simultaneously employ rigorous quantitative analysis and deep qualitative insights into a complex, inter-related set of forces from both inside and outside the firm. The discussions will challenge you to develop your skills in bringing both quantitative and qualitative evidence to bear in the analysis of marketing problems.
COURSE OBJECTIVES

The objective of the course is to familiarize you with

- The creative and strategic nature of branding
- Practical frameworks for managing a brand and experience project
- Tools for implementing a brand strategy in visual identity, communications and new media

The course will be useful for managing a brand and experience focused consulting projects, and to position or reposition a brand as a brand manager in various industries (e.g., consumer goods, services, and technology). Although many studies have confirmed the financial value of brands in creating shareholder value, brands must be actively managed in the face of developing consumer perceptions, changing competitive forces, and evolving social and cultural pressures.

COURSE PREREQUISITES

Marketing Management (RSM251) and (RSM 392H1, RSM 250H1)

READINGS

Required Online Course Packet. All Harvard course material (e.g., most of the cases and a few of the readings) can be purchased by accessing the Harvard Business School Publishing website (http://cb.hbsp.harvard.edu/cbmp/access/57300622).

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

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


In addition, there are several useful books on managing brands. The textbook by *Keller is considered the standard, comprehensive reference on branding. You may want to consult the following sources for more background material:

EVALUATION AND GRADES

Grades are a measure of the performance of a student in individual courses. Each student shall be judged on the basis of how well he or she has command of the course materials.

<table>
<thead>
<tr>
<th>Work</th>
<th>Due Date</th>
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<tbody>
<tr>
<td>Research Requirement</td>
<td>3%</td>
</tr>
<tr>
<td>Participation/attendance</td>
<td>12% Ongoing</td>
</tr>
<tr>
<td>Mid-term exam</td>
<td>20% Week 7</td>
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<tr>
<td>Group Projects</td>
<td>35% Week 8, 9, 12</td>
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<tr>
<td>Final exam</td>
<td>30% Exam Period (TBD)</td>
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<tr>
<td>Bonus Points</td>
<td>Ongoing</td>
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Given the nature of the course, you will be graded on your strategic analysis as well as your creativity.

COURSE FORMAT AND EXPECTATIONS

*Conduct Policies.* You are expected to attend all class sessions, actively participate in discussions and assignment, complete assignments, and follow the honor code. **This course adheres to UofT core culture. Students are expected to be:**

**Present:**
- On time and present for every session
- Attendance tracked

**Prepared:**
- Complete pre-work needed, expect cold calling
- Bring nameplates (Failure to do so may preclude any participation credit for that day)

**Participating:**
- Constructive participation expected and part of grade
- No INTERNET AND PHONES unless explicitly called for by the instructor

1. **Research requirement (3%)**

Marketing and Organizational Behavior researchers develop hypotheses and run experimental studies to test these hypotheses against actual behavior. The research requirement in this course is intended to supplement the material on marketing and organizational behavior by giving you more direct exposure to research in marketing and organizational behavior. Once you complete this research requirement, you will be given 3 points toward your grade in this course. In order that you might better understand the research process, you may fulfill this requirement by: (1) participation in three research studies or (2) analysis of three articles that report research studies.

**PARTICIPATION.** To participate in a research study, sign-up for an account online at http://rotman-credit.sona-systems.com. When you request an account, make sure you fill out all of the information accurately, including selecting the correct course and section, to ensure that you receive credits. Once you have an account, you may read over the descriptions of research studies that are posted online. When you identify a study in which you would like to participate, you may view available timeslots for that study and sign-up online to participate. Participation in the actual research study will take between 45 and 60 minutes. 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 for completing one study. You must complete three studies to fulfill your research participation requirement in this course. You should try to participate in the research studies earlier in the term; there is often a rush on research studies during the last weeks of class, and
we cannot guarantee places to those who attempt to sign-up during the last week. The research participation requirement MUST BE COMPLETED BY THE DUE DATE (TBD).

OR

ANALYSIS OF ARTICLE. To analyze an article, go to the Robarts library and find a copy of one of the approved journals. If you are in a marketing course, you may use the Journal of Consumer Research, the Journal of Marketing, or Marketing Science. If you are in an organizational behaviour course, you may use the Academy of Management Journal, the Journal of Applied Psychology, the Journal of Organizational Behavior, or Personnel Psychology. Look through the articles from the previous three years until you find one that interests you. Read the article. Write a summary of: 1) the objectives and hypotheses of the article; 2) the importance of the issues to the marketing or organizational behaviour community; 3) the research reported in the article, including the design of the study, the sample, and the materials (stimuli) used in the study, 4) the key results, 5) strengths and weaknesses of the study, and 6) the usefulness of the results to marketers or organizational behaviour practitioners. The analysis will be graded on a pass/fail basis. You will need to review three articles to complete your research requirement. Please contact Dr. Robert Latimer (robertblatimer@gmail.com), if you would like to analyze research articles to fulfill your research requirement. Hard copies should be left in the mailbox of Dr. Robert Latimer in the Rotman School. Write-ups submitted by fax or email will not be accepted. The analysis of article research requirement MUST BE COMPLETED BY THE DUE DATE (TBD).

2. Individual class participation (12%)

You will complete a photobook in class http://rotman.az1.qualtrics.com/SE/?SID=SV_0ixapIHyLb3lSAd. Do NOT complete the survey before class. Details will be supplied in class.

By default, every student will receive 7 (out of 10) points for class participation. If you make significant contributions to class discussions, you may receive more than 7 points. On the other hand, you will receive fewer than 7 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 or texting.

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 the 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?

In order to facilitate your participation, 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.
3. **Midterm Exam (20%) and Final Exam (30%)**

There will be two exams, a midterm (in-class, week 7) and a final exam (Exam Period; TBD). Both exams will be closed-book. The midterm will cover materials up to week 4. The final exam will be comprehensive. The exams will be based not only on assigned readings but also on material discussed in class but not covered in the readings.

Note: The midterm exam is shorter than the final. You may consider it as an in-class exercise. If you are not satisfied with your midterm score, you may ask us to discard it, and we will then weigh your final score accordingly. You must submit your request at least one week prior to the final exam and must do so via e-mail to my TA.

4. **Group Work (35%)**

All the group projects require students to work in teams of 5-6.

1. Brand retail visits (10%). As part of the Brand Retail Visits, you will analyze and judge various retail outlets and present your analysis in class. Details about this project will be supplied in class.

2. Final project presentations (25%). You will do a group project on a struggling brand of your choice. Each group will study a single brand. The project has three deliverables: one short write-up and two presentations. Additional details about this project will be supplied in class.

Brand selection - Brands will be assigned on a “first-come, first-served” basis (start in Week 2). Submit three possible brands for the final project and include the rationale (50 words or less for each brand) by Week 4. You may include up to two figures as supplementary materials. Please note that you may not select any brand that is the focus of a case discussion in this course. You should also avoid automobiles and smartphones because they are covered as examples in the brand crisis management. You must avoid any brands that primarily target children or vulnerable populations. To insure that every team starts on equal footing, you may not select a brand with which a team member (or a close relative of a team member) has worked.

Part I (10%) - ANALYSIS: What is the main challenge the brand is facing? How can you support the challenge with data? Why is the brand facing that challenge? What are some preliminary thoughts on how to approach the brand’s challenge(s)?

Part II (15%) - RECOMMENDATIONS: Present your group’s strategy to turn around the struggling brand of your choice. Include your proposed plan of action, providing examples of implementation. In doing so, please use 3C-STP-4P framework’ studied in class.

**Deliverables for group work:**
- Form groups – Complete the group assignment form (Google Doc to come) by Week 2.
- Submit 3 brands and the rationales – First come, first serve; by the start of class in Week 4
- Brand retail visits – Week 6
- Brand retail group presentations – Week 8
- Final presentations (I) – Week 9
- Final presentations (II) – Week 12

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1 Integrated brand-management model based on the 3C-STP-4P Marketing Strategy framework. The concepts and tools of the model involved brand identity, brand equity, planning/portfolio, experience, execution (see page 1 of the course outline)
Except for group formation, all the write-ups and presentation decks must be uploaded to Portal by 9:00am on the day of class. You must also turn in a hardcopy of your assignments at the start of class. For all the documents, try to print on both sides. For the presentation decks, print two slides per page.

Name the file using this format:

RSM458-GroupName-Brand, e.g. RSM458-GroupVine-Twitter

The first slide should include: (1) group name, (2) brand, and (3) UofT student ID numbers. Do not put your name on the written assignments.

The grade for all the group presentations will be based on a process of peer evaluation (inter-group) that will be explained later by the professor. The evaluation criteria for the presentation will include “Conceptual content”, “Choice of topics”, “Structure/sequence (of the presentation)”, “Clarity of Communication”, “Learning for the audience” and the “Likelihood that you would approve the plan”.

**Peer-evaluation.** 15% of the 35% (approximately 5% of your total grade) will be based on a peer-evaluation of group participation/contribution. This will be conducted after the Retail Visits Presentations and the Final Presentations Part II respectively. 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.

Groups in which everyone pulls their weight and contributes perform best.

5. **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 per project. I may do this a few times in the semester without advance notice. If you miss the class, you miss the credit.

**WEEKLY SCHEDULE**

*Class Schedule & Reading List.* The class schedule may be modified by the instructor depending on contingencies. Students are responsible for staying in touch with the progress of the course and for obtaining additional reading materials from Portal.

- **C:** Course Packet. Cases and HBS Notes must be purchased online; see *Required Readings*
- All the other articles are available on the Portal (Blackboard)

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<tr>
<th>Week</th>
<th>Date</th>
<th>Topic, Cases, Readings, and Assignments</th>
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| 1    | Jan 5 | **Introduction: What is brand?**  
    Readings: Course Outline; Best Global Brands (Interbrand); Branding in the Age of Social Media |
| 2    | Jan 12 | **Brand Equity**  
    Readings: Brand Equity: An Overview; The Romantic Advantage; What are Brands for?  
    *Form groups for Group Work (between 1st and 2nd sessions)* |
| 3    | Jan 19 | **Branding and Positioning Strategy**  
    Case: Milk, Yellow Tail (Portal)  
    Readings: Famous Names; Capitalizing on the Underdog Effect; Getting Brand Communities Right |
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<th>Week</th>
<th>Date</th>
<th>Topic, Cases, Readings, and Assignments</th>
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<tbody>
<tr>
<td>4</td>
<td>Jan 26</td>
<td><strong>Brand Portfolio and Product Policy</strong></td>
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<td>Case: Bank of America: Mobile Banking</td>
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<td>Readings: The Brand Relationship Spectrum</td>
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<td>Submission for 3 possible brands for the Final Project due</td>
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<td>5</td>
<td>Feb 2</td>
<td><strong>Brand Experience and Brand Crisis Management</strong></td>
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<td>Case: elBulli</td>
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<td>Readings: Volkswagen and The End of Corporate Spin</td>
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<td>6</td>
<td>Feb 9</td>
<td><strong>Retail Tour</strong></td>
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<td>Readings: Managing The Growth Tradeoff: Challenges and Opportunities in Luxury Branding; Luxury Brand Marketing – The Experience is Everything!</td>
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<td>7</td>
<td>Feb 16</td>
<td><strong>Midterm</strong></td>
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<td>No Readings</td>
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<td><strong>READING WEEK Feb 20-24</strong></td>
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<tr>
<td>8</td>
<td>Mar 2</td>
<td><strong>Retail Visits Presentations</strong></td>
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<td>Readings: The Customer Network Revolution; Think with Google, “Brand Building in a Digital Age” with Andrew Keller, John Battelle, Gareth Kay; The Challenge of the Global Brand; Building Brands in Emerging Markets; The Emerging Brand Battle; Brands and The Fulfillment of Cultural Identity Needs</td>
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<tr>
<td>9</td>
<td>Mar 9</td>
<td><strong>Final Project Group Presentation Part I – Analysis</strong></td>
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<td>No Readings</td>
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<td>10</td>
<td>Mar 16</td>
<td><strong>Building a New Brand</strong></td>
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<td><strong>The Future</strong></td>
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<td>Case: The Medicine’s Company</td>
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<td>Readings: The Best Way to Name Your Product 2.0; Use Big Data To Create Value For Customers, Not Just Target Them; Don’t Let Big Data Bury Your Brand</td>
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<tr>
<td>11</td>
<td>Mar 23</td>
<td><strong>Review and Final Project Part II Preparation</strong></td>
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<td>Readings: Brand Equity Management in a Multichannel, Multimedia Retail Environment</td>
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<td>12</td>
<td>Mar 30</td>
<td><strong>Final Project Group Presentations Part II – Recommendations</strong></td>
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<td></td>
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<td>No Readings</td>
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**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 **48 hours** 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.
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 report of illness made by the student and documented by the physician. If approval is granted, a resolution will be determined by the instructor and may take the form of an alternate deliverable, a re-weighted grade calculation, a make-up exam or rewriting the exam. For situations in which students are not granted an academic accommodation for a missed or late deliverable, the missed or late deliverable will be subject to an academic penalty. The extent of the penalty is at the discretion of the instructor.

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.accessibility.utoronto.ca/.

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 ROSI 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.

Blackboard and the Course Page. The online course page for this course is accessed through Blackboard. To access the course page, go to the UofT Portal login at https://portal.utoronto.ca/ and log in using your UTORid and password. Once you have logged in, look for the My Courses module where you’ll find the link to all your course websites. If you don’t see the course listed here but you are properly registered for the course in ROSI, wait 48 hours. If the course does not appear, go to the Information Commons Help Desk in Robarts Library, 1st floor, for help, or explore the Portal Information and Help at http://www.portalinfo.utoronto.ca/content/information-students and review the Frequently Asked Questions.

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 any way. 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.

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; to work well in teams, it helps to follow a set of core expectations to best succeed at your team projects.

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;
   • Honor 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 conflicts:
Conflicts are part of the team’s process of learning how to work together. When handled well, it can generate creativity and bring multiple perspectives to the solution.

Student teams are expected to work through their misunderstandings as soon as they arise (and prior to submission of the final project). When teams are unable to arrive at a solution that works for all members, the 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.

**For an appointment with a Rotman Commerce Team Coach, please contact Nouman Ashraf at nouman.ashraf@rotman.utoronto.ca  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.