



# Rotman Commerce UNIVERSITY OF TORONTO

## Course Outline

### **RSM458H1S – L0101**

Branding Strategy

Winter 2018

Thursday/2-4pm/RT142

### **RSM458H1S – L0201**

Branding Strategy

Winter 2018

Thursday/4-6pm/RT142

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Instructor: Scott Hawkins, 105 St. George Street, RT573  
E-Mail: [hawkins@rotman.utoronto.ca](mailto:hawkins@rotman.utoronto.ca)  
Webpage: <http://portal.utoronto.ca>  
Phone: 416-978-4196  
Fax: 416-978-5433  
Office Hours: Thursday, 1-2 pm

### *Overview*

Students will assume the role of senior brand managers responsible for the design, implementation, and evaluation of branding strategies. Brands represent valuable assets that must be created, sustained, leveraged, and defended. This course will use case analysis and a group project to reinforce successful decision making and communication skills.

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. Brands (the names, symbols, and designs used to uniquely identify goods and services) are valuable to firms because they have value for customers. Sometimes they make a product more memorable; sometimes they carry rich and powerful associations; sometimes they perform important social functions; and, sometimes they carry significant cultural meaning. Consumers may even form relationships in which the brands help to define who they are and communicate this self-image to others. The varied meanings and functions of brands for customers creates enormous challenges and opportunities for marketers.

In this course we will develop a customer-based perspective on brand equity in order to understand how strategic brand and marketing mix decisions influence customer awareness, associations, feelings, and behaviours. We will endeavor to draw together current theory, research methods, and business problems in order to develop practical insights in the successful management of brands. The course will employ a mix of lectures, readings, cases and a group project. The lectures will cover selected topics in marketing theory and branding. The readings are intended to supplement the material covered in class, provide insights into current thinking about the management of brands, and assist in the preparation of case analyses. The case discussions will provide further experience with the marketing decision making process and provide an opportunity to sharpen the understanding of brand management by applying it to concrete business situations. Finally, the group project will provide you the opportunity to perform a detailed assessment of brand equity for a brand of your choosing and develop a comprehensive set of recommendations to build, leverage, or defend that brand equity.

In order to benefit from and contribute to each class session, it is *essential* that you 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 you 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***

- To develop an understanding of the strategic importance of brands in creating value for customers and firms.
- To appreciate the nature of the challenges in planning, executing, and controlling branding strategies.
- To develop a customer-based view of brand equity that explicitly addresses the role of cognitive, emotional, behavioural, social, and cultural factors in creating brand equity.
- To explore the value of current theories and methods from psychology, sociology, and anthropology in understanding the impact of brands on customers.
- To gain familiarity with some of the tools and tactics that firms use to create, sustain, leverage, and defend brand equity.
- To refine analytical and decision making skills and the ability to express conclusions orally and in writing.

### ***Course Prerequisites***

RSM251H1(RSM392H1,RSM250H1)

### ***Required Readings***

Many of the required readings are available at the Harvard Business School Publishing website (see *Online Resources* below), which will allow you to purchase and access the files electronically. All other required readings are available electronically through the [University of Toronto Libraries](#). You can view and/or print these articles online by clicking on the article titles on the Course Sessions page for this course on the portal (see *Online Resources* below). Daily reading assignments are listed in the *Class Schedule* (see below). You must: (1) purchase the course package from the bookstore, (2) purchase the course material from the Harvard website, and (3) access the links to the readings available through the library, which are posted on the portal.

### ***Required Online Resources***

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/72718170>). You should access this site *before the first class* in order to log in and purchase all of the Harvard material for the course. Once you provide your contact information and pay the fees indicated, you will be able to view and download that material from the Harvard website.

Additional course resources including announcements, case material, required readings, lecture notes, handouts, and links to relevant websites are available on the *University of Toronto Portal* (<http://portal.utoronto.ca/>). You must log in to this website using your UTOR id and password before the first class and regularly during the course in order to access required reading and case material. 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 this course listed there 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.

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. This information must be entered before you will be allowed to join a group or submit your written assignments. 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.

It is expected that students in the classroom will use technology responsibly, with consideration for their fellow students and other members of the University community. Students are encouraged to use laptops for note taking, in-class activities, and course-related portal and web access. Laptops are not to be used for email, instant messaging, web browsing, or any other activity that is disruptive to other students, the instructor, or the classroom environment.

### ***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**. The written analyses and class discussions will draw extensively on the marketing theory, analytic methods, and concepts covered in these sources. The following recommended readings provide useful reference material:

Kotler, P., Keller, K. L., Cunningham, P. H., & Sivaramakrishnan, S. (2012). *Marketing Management, Fourteenth Canadian Edition*, Pearson Education Canada. (MBA-level textbook)

Peter, J. P. & Donnelley, J., Jr. (2014). *A Preface to Marketing Management, Fourteenth Edition*, McGraw-Hill Ryerson. (condensed MBA-level textbook)

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

Aaker, D. A. (1995). *Building Strong Brands*, The Free Press.

Aaker, D. A. & Joachimstaler, E. (2000). *Brand Leadership*, The Free Press.

Kapferer, J. N. (2012). *The New Strategic Brand Management*, Fifth Edition, Kogan Page.

\*Keller, K. L. (2012). *Strategic Brand Management, Fourth Edition*, Prentice Hall.

### ***Grading***

Each assignment for this course will be given a numeric mark between 0 and 100 (see the [Rules & Regulations](#) in the *University of Toronto Faculty of Arts and Sciences Calendar*). The final grade for the course will be computed by multiplying the numeric mark on each assignment by the corresponding weight for that assignment.

<b><i>Course Component</i></b>	<b><i>Due Date</i></b>	<b><i>Weight</i></b>
Class Participation (individual)	Ongoing	15%

Brand Audit Proposal (group)	February 1	10%
Case Write-up (individual)	March 1	17%
Research Requirement (individual)	March 30	3%
Brand Audit Project Report (group)	March 29	25%
Brand Audit Presentation (group)	March 29	5%
Final Examination Case (individual)	TBA	<u>25%</u>
Total		100%

### ***Class Participation***

Thoughtful questions, rigorous analysis, strong oral presentation skills, and the ability to critically evaluate alternative perspectives are crucial skills for any successful manager. This course will focus on developing a rigorous and practical understanding of the management of brands by encouraging active participation in the analysis of a range of real branding challenges.

Participation grades will be assigned based on each student's comments during each session. In order to benefit from the case method of instruction employed in this course, you must read and analyze each case before the appropriate class session. Thorough preparation before each session will allow you and your colleagues to consistently offer high-quality comments during the class discussions. It is important to understand that the class participation grade is intended not just to provide me with information about your preparation and understanding of the assigned material and your persuasive abilities, but to provide you with an incentive to get involved in discussions and share your unique perspective.

**Keep in mind that the participation grade is not only a function of the quantity of participation, but the quality of participation.**

You are encouraged to regularly contribute relevant facts, questions, interpretations, examples, terminology, frameworks, and alternative points of view during the case discussions. The assigned cases provide rich detail regarding a range of marketing situations. The class discussions will provide a forum to consider a range of interpretations and analyses of these details in order to support one or more action plans. You are strongly encouraged to draw on relevant concepts, theories, and analytic methods from your assigned readings and marketing courses.

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?

Although everyone will be encouraged to participate, a number of students *may* be called on randomly during each case discussion. In order to facilitate your participation, it may be useful to prepare a one page summary of your major analyses and conclusions. Although this summary is not required, it can be a useful memory cue

at the time of discussion and during later review of the material. If you have written-up a case analysis, you should bring a copy of the written analysis to the discussion (in addition to the copy that will be submitted).

You should use these classroom discussions as an opportunity to develop the oral communication and persuasion skills that are essential in most management careers. It is my responsibility to encourage and enforce a respectful environment in the classroom, and you should feel at ease when asking questions or contributing ideas during the discussions. Likewise, you should respect the views expressed by your colleagues by offering your complete attention and constructive contributions.

Students are expected to attend every class. Frequent and/or unapproved absences or a consistent failure to participate in discussions could result in an FZ (failing grade) for class participation. In the event of widespread student or instructor absence due to illness, it is at the discretion of the instructor to modify the class participation grade assessment to ensure that students are not penalized for absences that are a direct result of an emergency situation. Please note that the slides used in case discussions will not be posted to the *University of Toronto Portal* portal.

**Your discussion performance will be assessed on a scale from 0 to 4 following each class session based on the considerations above. In order to insure that you receive credit for your participation you must bring a name card to every class session. Failure to bring a name card may preclude any participation credit for that day.**

**You must notify me by email if you plan to use a name in class (e.g., on your name card) that is different from the name you submitted to the registrar.**

### ***Individual Written Assignment***

You will write one four-page case analysis during the term that will be submitted on the date specified below. You may include up to six pages of additional exhibits (tables, charts, diagrams, financial analyses) to support your written analysis. You must submit two copies of your written report: (1) submit an electronic copy of your report to the dropbox (located in the folder for that course session) on the *University of Toronto Portal* (<http://portal.utoronto.ca/>); (2) submit a printed copy of your report in class.

Your case report is due *at the beginning* of the class sessions during which we discuss the case. Late submission of the written case analysis will not be accepted (see *Late Assignments* below). You should not discuss the individual case write-up with anyone else before class. All analysis, writing, and appendices must be your own (see *Academic Offences* below).

The goals in preparing a written case analysis are: (1) to identify the problems faced in a management situation; (2) to summarize the key issues and insights critical to understanding the problems; and (3) to outline a specific action plan for the decision maker(s) in the case. A successful case write-up will highlight the key facts and constraints in the case, integrate and interpret that evidence, and develop a detailed set of recommendations that follow logically from those insights. You should generally avoid introducing facts and analyses from sources outside the case (other than the assigned readings). A page limit on the write-up may seem quite restrictive, but it will force you to assess the relative importance of the ideas developed in your analysis. It is extremely important to learn how to distinguish central ideas from peripheral details. You may assume that the reader of your paper has knowledge of the general issues discussed in the case.

There are a number of specific issues that must be considered in the write-up of a marketing case. The objective in considering these issues is to generate thoughtful and defensible positions, arrived at through creative integration of case facts, marketing theory, and current marketing practice. You must consider all aspects of the situation presented in the case in order to diagnose and treat the appropriate problems. Most marketing analyses contain the following sections:

1. *Problem statement* - What is the problem in the case? Is there a salient threat or opportunity? What are the key constraints on the recommendations?
2. *Market analysis* - How big is the market? What are the industry-level trends? Are there significant macro-environmental (economic, social, political, etc.) forces?
3. *Company analysis* - What business are we in? What are our objectives? What are our strengths and weaknesses? What are our most valuable resources and skills?
4. *Competitor analysis* - Who are the current and potential competitors? What strategies are they pursuing? What threats and opportunities do they pose?
5. *Consumer analysis* - Who is the consumer? What segments exist? What are their needs? How involved are they? How do they make their choices?
6. *Recommendations* - What is the action plan? What options were considered? Why is this the best option? How will it be implemented? What are the risks?

PLEASE STRUCTURE YOUR WRITTEN ANALYSES USING THESE SECTIONS. The questions in each section above highlight issues that are relevant to an understanding of most marketing cases, but may not apply to all cases. You should also check the portal for supplemental material for each case. I will post specific questions for each case that should be addressed in your written analysis and class discussions. Of course, the relative importance of the issues that need to be addressed will vary based on the requirements of each case. The list of issues and questions should be considered suggestive not comprehensive. In addition, there may be spreadsheets containing data for some of the cases. **When preparing a written case analysis, you should avoid: (1) simple fact recitation without interpretation, and (2) speculation without evidence or analyses to support your insights.**

The case write-up should also include up to six additional pages of exhibits that provide conceptual or quantitative analyses to support your interpretations and recommendations. The purpose of the exhibits is to provide additional details from your analysis to support your interpretations, conclusions, and recommendations. They might include detailed calculations, tables summarizing key insights about consumer segments, competitors, company strengths and weakness, options considered, etc. The exhibits could provide figures that show the positioning of various brands or a flowchart summarizing the decision process followed by different consumers, etc. Exhibits should provide clear and compelling elaboration or support for the issues addressed in the main body of the analysis. It is often effective to provide a one sentence summary on each exhibit to help readers understand what they should “take-away” from the exhibit. Assumptions should be explicitly identified in the exhibit. In addition, any exhibits must be referred to in the written analysis.

Please observe the following administrative guidelines for the written case analysis:

- All assignments should be printed on standard-sized white paper and should have a word count (for the text only) at the bottom of the final page of text. Please do not use a binding (other than staples) on the case assignments.
- The text of the written analysis must not exceed four pages. You should use a 10 point font with 1 inch margins on all sides of the paper. Please double-space the text and number the pages. The page limit will be strictly enforced, and you will be penalized 10% for submitting text beyond four pages.
- A maximum of six pages of exhibits may be appended to your analysis to provide further conceptual or numerical analysis, and these should be used only to support your analysis (do not use the appendices for additional passages of text or simply to “bulk-up” an analysis). In addition, the implications of any exhibits must be discussed in the written analysis.

- The text of the analysis should be in prose form, and bullet points and outlines should be used sparingly.
- Put your University of Toronto student ID number on the front page of all assignments. Do not put your name on the written assignments.
- Finally, keep a copy of your written analysis when you turn in the paper to protect yourself in the event of an administrative problem. You should also have a personal copy available during the class discussion.

For additional information on analyzing, discussing, and writing-up cases in marketing, see “The Case Method of Instruction” on the **University of Toronto Portal** (<http://portal.utoronto.ca/>) and “Customer Profitability and Lifetime Value” (in the HBS course package).

Please note that *clear, concise, and correct writing* will be considered in the evaluation of written assignments. 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](http://www.asc.utoronto.ca)) or one of the College Writing Centres ([www.writing.utoronto.ca/writing-centres](http://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.

*You will be required to submit written analyses for the following cases on the specified dates:*

***EILEEN FISHER: Repositioning the Brand (HBS 9-512-085) – March 1***  
***Final exam case – Title and Date TBA***

### ***Brand Audit Project***

You will also conduct a brand audit and submit a twenty-page written **project report** (you may include another ten pages of exhibits containing references, figures, tables, data analysis, summaries/details of research methods, etc.) *as part of a five-member group*. The purpose of the brand audit project is to give you the opportunity to perform a detailed assessment of brand equity using the concepts and tools acquired in the course and provide strategic recommendations to build, leverage, or defend that brand equity. **Your group must submit two copies of your written report: (1) submit an electronic copy of your report to the dropbox on the University of Toronto Portal (<http://portal.utoronto.ca/>); (2) submit a printed copy of your report in class.**

Each group will study a single brand, and brands will be assigned on a “first-come, first-served” basis (after the second class session). You should give careful consideration when selecting the brand that you wish to audit. Some relevant criteria might be: (1) Does the brand have inherent interest or value for you? (2) Are you able to easily access potential consumers for data collection? (3) Will accessible consumers be familiar with the brand? (4) Will you have access to information about the company, brand strategy, and tactics? (5) Is the brand experiencing challenges or facing untapped opportunities with its brand architecture, brand portfolio, brand extensions, brand revitalization. Please note that you may not select any brand that is the focus of a case discussion in this course or in Marketing Management (RSM251). You should also avoid any brands that are covered as examples in the brand audit readings. 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.

The brand audit is one of the tools used to assess the sources of brand equity and to provide recommendations on the management of a brand. The brand audit report for your chosen brand will include four sections:

1. *History and Key Challenges.* The Brand Audit should begin with a brief overview of the brand history, recent market trends, and the key environmental challenges and opportunities facing the brand (e.g., market size and trends, brand positioning and values, key competitors and their positioning and values, situation analysis, consumer segments and decision processes). This section can also identify broader political, economic, social, and technological trends (PEST). Based on this summary of the marketing environment facing your brand, you should explicitly identify current threats and/or opportunities for specific dimensions of brand equity. How might historical developments, market trends, changes in consumer behavior and/or competitor activities influence consumer perceptions of your brand in negative or positive ways?
2. *Brand Inventory.* This is a comprehensive survey of the current brand strategy and the branding elements, secondary associations, and marketing mix tactics used to support the brand (internal focus). Who are the target consumers? How is the brand positioned in the market? What is the brand essence that management is trying to convey? Can you describe the brand architecture? What are the specific brand identity elements (names, logos, symbols, characters, packaging, slogans, etc.), secondary associations (people, places, things, and brands), and marketing mix tactics (product, pricing, communication, distribution) supporting the brand? Are they successfully building brand equity?

The Brand Inventory involves developing a comprehensive summary of the brand as viewed and enacted by the company that manages it. To do this, you will need to review and describe the marketing program supporting the brand and critically analyze how the brand has been crafted and developed. This perspective on brand meaning provides you with a historical perspective and foundation for the brand. Succinctly summarize how the brand has been built through marketing programs across time. The analysis in the Brand Inventory should conclude with a clear discussion of the strengths and weaknesses of the current marketing strategy in creating, building, or maintaining your brand equity.

3. *Brand Exploratory.* This is a detailed investigation of consumers' perceptions of the brand (external focus). How do consumers think and feel about the brand and its category? You should present 3-4 hypotheses about specific aspects of brand equity based on the opportunities and threats identified in the History and Key Challenges and the strengths and weaknesses identified in the Brand Inventory. What are the awareness levels and significant associations created by the current brand strategy? How have recent competitive activities influenced our brand associations? How do specific brand and marketing mix elements contribute to consumer perceptions, feelings, and behaviours? Are there significant differences between groups of consumers (e.g., user v. non-users, heavy-users v. light users, loyal users v. switchers, demographic segments, etc.) on various measures of brand equity (e.g., awareness, beliefs, imagery, judgments, feelings, etc.) or in their responses to the various aspects of brand strategy (e.g., price sensitivity, valuation of benefits, attitudes toward communication efforts, etc.)?

The Brand Exploratory should offer in-depth profiles of consumers' brand knowledge structures. This will require the careful development of a set of objectives for your data collection. What aspects of brand equity do you most need to investigate with your target consumers? You should plan on employing at least three distinct data collection methods: 1) one or more measures of familiarity or brand awareness; 2) at least one qualitative research method (e.g., free association, one-on-one depth interviews, focus groups, ZMET); and 3) at least one quantitative method (e.g., observation, surveys, conjoint studies, experiments). You should develop a plan to employ these research techniques sequentially over the course of the semester in order to incrementally build insights into the brand strategy and brand equity. In this section of the Brand Audit you should develop a set of insights (based on your evidence) about the target consumers of your brand and their thoughts, feelings, and



behaviours toward the brand. This analysis should employ conceptual models from the branding literature to highlight specific challenges or opportunities for your brand's equity.

4. *Brand Recommendations.* This is a set of 3-5 strategic recommendations to improve the management of a brand's equity (action focus). How have changes in the competitive environment or consumer market affected our brand equity? What are the strengths and weaknesses of current marketing efforts in influencing brand equity? What specific changes would you recommend to the current brand strategy? How does your data from the Inventory and Exploratory phases support the recommendations? What are the objectives and specific goals in making these changes? How will the changes be implemented, monitored, and adapted? What are the most important risks associated with your recommendations and how should these be managed?

An explanation and example of the brand audit methodology can be found in the following reading from the Keller textbook (which is contained in your readings packet). Please read this material very carefully. It contains detailed suggestions for conducting successful brand audits.

Keller, K. L. (2012). "Brand Audit Guidelines," *Strategic Brand Management, Fourth Edition*, Pearson Education, 265-271. <sup>Portal</sup>

You will also find it useful to examine the following readings before conducting your brand audit:

Keller, K. L. "[The Brand Report Card](#)," *Harvard Business Review* (Jan-Feb 2000, reprint R00104)

Chandon, P. "[Note on Brand Audit: How to Measure Brand Awareness, Brand Image, Brand Equity and Brand Value](#)" (INSEAD 02/2004-5191)

Aaker, J. L. "[Dimensions of Brand Personality](#)," *Journal of Marketing Research* (1997, 34, 3, pp. 347-356)

Christensen, G. L. & Olson, J. C. "[Mapping Consumer's Mental Models with ZMET](#)," *Psychology & Marketing* (2002, 19, pp. 477-502)

Silk, A. J. "Questionnaire Design and Development" (HBS 9-590-015)<sup>HBS</sup>

Watson, D., Clark, L. A., & Tellegen, A. "[Development and Validation of Brief Measures of Positive and Negative Affect: The PANAS Scales](#)," *Journal of Personality and Social Psychology* (1988, 54, 6, pp. 1063-1070) – see Appendix

Wansink, B. "[Using Laddering to Understand and Leverage a Brand's Equity](#)," *Qualitative Market Research: An International Journal* (2003, 6, 2, pp. 111-118)

You should choose the members of your group before the beginning of the second class. People in your group should have roughly the same ambitions in terms of grades, similar availability patterns, etc. I will take care of any over/under-flows during the second class session. One member of your group should submit (by email) your top three preferred brands after the second class session and before the third class session. The entire group should contribute to the brand audit, and the grade will usually apply equally to all members of the team. If necessary, the contribution of each member of the group will be assessed by all members of the group at the end of the term and appropriate rescaling of each individual's grade for group work will be made (at the discretion of the course instructor).

Each team is responsible for obtaining access to their target market for their data collection efforts (think creatively, e.g., post on brand or category user groups on the web, use "snowball sampling" by asking research participants to pass along a survey link to relevant others, or visit public locations where the target market is

likely to congregate). Free on-line survey options include: surveygizmo.com, Zoomerang, and Survey Monkey. The Rotman School of Management maintains a site license for faculty and students to use the Qualtrics Research Suite. I have configured our Qualtrics system so that you can create your own research accounts, which allow for 14 weeks of unlimited use (# questions, # participants). Details on signing up for a Qualtrics account are available on the portal. In addition, you are responsible for locating appropriate facilities, developing procedures, and providing material for other data collections methods employed.

Each group will be required to submit a **brand audit proposal** that introduces their brand, identifies a set of questions/hypotheses about specific dimensions of brand equity, and proposes carefully-developed research methods to address those brand equity hypotheses. Your proposal should cover the following issues:

1. a brief brand history, the marketing environment confronting the brand (situation analysis) and how these forces create threats and/or opportunities for specific dimensions of brand equity;
2. the current brand strategy (including the branding elements, secondary associations, and marketing mix tactics used to support the brand) and how these strategic efforts are strengthening or weakening specific dimensions of brand equity;
3. at least three hypotheses regarding specific drivers (e.g., company marketing activities, competitive moves, changes in consumer behavior) of current brand equity and potential drivers of future brand equity;
4. data collection methods (participants, access, draft research instruments and procedures);
5. an analysis plan (statistics, models, or data summaries to be used to address hypotheses).

You should explain the specific aspects of brand equity that you intend to study in the form of precise hypotheses about specific aspects of brand equity (e.g., awareness, associations, feelings, responses, and brand community). You should also identify the number and characteristics of the consumers you will ask to participate in your research and how you will access them. Finally, you should explain in as much detail as possible the data collection methods that you intend to use in your brand exploratory (e.g., draft questionnaires, interview and/or focus group scripts), procedures for conducting qualitative research (e.g., ZMET, free association, projective techniques).

**Your proposal must also include the completed consent forms with all required information filled in (see consent form templates on the portal).** This proposal will be graded, and I will provide written feedback to guide your data collection efforts. Please double-space your proposal to facilitate feedback. **Your group must submit two copies of your Brand Audit proposal: (1) submit an electronic copy of your report to the dropbox on the University of Toronto Portal (<http://portal.utoronto.ca/>); (2) submit a printed copy of your proposal in class.**

Each group will also make a **brand audit presentation** of the major results from their brand audit project during the last class of the semester. You will have 5 – 7 minutes to highlight: (1) the key strengths, weaknesses, challenges, and opportunities for you brand equity, (2) major hypotheses studied, (3) your research methods and findings, and (4) your strategic recommendations for building brand equity. The presentation will be judged on the following criteria: content, organization, delivery, knowledgeability, and visuals. **Your group must submit two copies of the slide deck for your presentation: (1) submit your slide deck to my email address by 10 am on the day of the final class session; (2) submit an electronic copy of your report to the dropbox on the University of Toronto Portal (<http://portal.utoronto.ca/>). You should also bring the electronic copy of your slides to class on a memory stick (in .ppt format) or on a computer with an RGB video connection.**

This project requires that you undertake research with human participants. Please note that research of this nature requires treating participants ethically, according to established standards and practices. Please consult with your instructor before commencing your research to ensure that your research activities comply with the applicable policy and procedure. Any research conducted by University of Toronto students must comply with relevant

principles of ethical research. Students in this course should be knowledgeable about the TCPS2 (The Tri-Council Policy Statement 2), which summarizes the ethical principles that will govern your research with human participants (<http://www.pre.ethics.gc.ca/eng/policy-politique/initiatives/tcps2-eptc2/Default/>).

The Brand Audit requires students to work in teams. 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 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 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<sup>1</sup> 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.

*You will be required to complete the following elements for the Brand Audit Project on the specified dates:*

*Form Groups – January 4-11*  
*Submit Brands – January 11-18*  
*Brand Audit Project Proposal – February 1*  
*Brand Audit Project Report – March 29*  
*Brand Audit Project Presentation – March 29*

### ***Research Requirement***

Marketing researchers develop hypotheses and run experimental studies to test these hypotheses against actual behaviour. The research requirement in this course is intended to supplement the material on marketing by giving you more direct exposure to current research in marketing. 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**

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<sup>1</sup> For an appointment with a Rotman Commerce Team Coach, please contact Nouman Ashraf at [nouman.ashraf@rotman.utoronto.ca](mailto:nouman.ashraf@rotman.utoronto.ca). Nouman is highly skilled at facilitating team dynamics and collaboration. Note that the Team Coach’s role is to provide guidance, support and advice on team matters – not to formally evaluate or assess teamwork for academic purposes.

2. analysis of three articles that report research studies.

**Participation.** To participate in a research study, sign-up for an account online at <https://rotman.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 credit. 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 will need to *complete three studies to fulfill your research participation requirement* in this course. **OR**

**Analysis of Article.** To analyze an article, go to the Robarts library and find a copy of one of the approved journals: the *Journal of Consumer Research*, the *Journal of Marketing*, or *Marketing Science*. 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 Autumn Bynum at [Autumn.Bynum@Rotman.Utoronto.Ca](mailto:Autumn.Bynum@Rotman.Utoronto.Ca) if you would like to analyze research articles to fulfill your research requirement or if you have any questions about the research requirement.

***You will be required to complete the Research Requirement by Friday, March 30.***

### ***Final Examination***

The final exam will consist of a two-hour, written, case analysis. You will use the standard case analysis format (see *Individual Written Assignment* above) to address the major challenges in the case. There is no page limit for the final examination. The final examination case will be distributed at end of the last class session. **YOU MAY NOT DISCUSS THE FINAL EXAM CASE WITH ANYONE.** The location, date, and time of the exam will be provided by the Faculty of Arts & Sciences Registrar's Office later in the semester.

### ***Late or Missed Assignments/Exams***

The written case analysis must be submitted at the beginning of the class during which it is due. Late papers will not be accepted because the case is discussed in class. You should anticipate schedule conflicts and submit the paper early if necessary.

Students who miss an exam or assignment due date for reasons entirely beyond their control (e.g. illness, family affliction) may submit a request for accommodation. Provided that the notification and documentation are submitted in a timely manner, and that the request is subsequently approved, no academic penalty will be applied.

In such circumstances, students must notify Rotman Commerce *on the date* of the missed exam (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 exam or due date. **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.** Documentation submitted in support of requests for accommodation must be original; no faxed or scanned copies will be accepted.

If an accommodation request is approved by the Rotman Commerce Program Office, a resolution will be determined by the instructor and may take the form of an alternate deliverable, re-weighted course grade

calculation, make-up exam, or another solution deemed appropriate by the instructor. If an accommodation request is not approved, the student will be given a grade of 0 (zero) for the missed exam or course work.

### ***Requests for Re-Grading***

Requests to have assignments remarked will be considered if all the following conditions are met:

1. the assignment is submitted to the instructor no later than two weeks after the marked assignment has been returned to the student;
2. the student submits with his/her request a written explanation as to why and where he/she believes he/she is entitled to more marks; and
3. the instructor has no reason to believe the student has made any changes subsequent to the assignment being returned.

### ***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 University of Toronto Accessibility Services as soon as possible: [disability.services@utoronto.ca](mailto:disability.services@utoronto.ca) or <http://www.accessibility.utoronto.ca/>.

### ***Recording Discussions***

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, discussion, 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. Please note that I rarely grant permission to record case discussions (other than as an accommodation for a disability).

### ***Academic Integrity***

Academic Integrity is a fundamental value essential to the pursuit of learning and scholarships at the University of Toronto. Participating honestly, respectfully, 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 not is 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.

## Class Schedule

<i>Session</i>	<i>Date</i>	<i>Topic and Assignment</i>
1	January 4	<p><b>Introduction to Branding Strategy</b>            Reading: Blackett, “What is a Brand?” <i>Interbrand</i> (2004)<sup>Portal</sup>            Reading: Keller &amp; Lehman, “<a href="#">How Do Brands Create Value?</a>” <i>Marketing Management</i> (May/June 2003, 12, 3, pp. 26-31)<sup>Portal</sup>            Reading: Various Contributors, “<a href="#">Best Global Brands</a>,” <i>Interbrand</i> (2017)<sup>Portal</sup>            Reading: Peters, “<a href="#">The Brand Called You</a>,” <i>Fast Company</i> (Aug/Sept 1997)<sup>Portal</sup>            Reading: Clark, “Reinventing Your Personal Brand,” <i>Harvard Business Review</i> (Mar 2011, HBR reprint R1103E)<sup>Portal</sup>  <b>Form groups with five people for Brand Audit Project (between 1<sup>st</sup> and 2<sup>nd</sup> sessions)</b></p>
2	January 11	<p><b>Understanding Brand Equity</b>            Reading: Despardé &amp; Keinan, “Brands and Brand Equity” (HBS 8140)<sup>HBS</sup>            Reading: Keller, “<a href="#">Building Customer-Based Brand Equity</a>,” <i>Marketing Management</i> (Jul/Aug 2001, pp. 15-19)<sup>Portal</sup>            Reading: Keller, “<a href="#">How to Navigate the Future of Brand Management</a>,” <i>Marketing Management</i> (Summer 2011, pp. 36-43)<sup>Portal</sup>  <b>Submit three possible brands for Brand Audit Project by email (between 2<sup>nd</sup> and 3<sup>rd</sup> sessions)</b></p>
3	January 18	<p><b>Measuring Brand Equity</b>            Reading: Keller, “Brand Audit Guidelines,” <i>Strategic Brand Management, Fourth Edition</i> (2012, pp. 265-271)<sup>Portal</sup>            Reading: Keller, “<a href="#">The Brand Report Card</a>,” <i>Harvard Business Review</i> (Jan-Feb 2000, reprint R00104)<sup>Portal</sup>            Reading: Chandon, “<a href="#">Note on Brand Audit: How to Measure Brand Awareness, Brand Image, Brand Equity and Brand Value</a>” (INSEAD 02/2004-5191)<sup>Portal</sup>            Reading: Keller, “Measuring Sources of Brand Equity: Capturing Customer Mindset,” <i>Strategic Brand Management, Fourth Edition</i> (2013, pp. 296-324)<sup>Portal</sup>            Reading: Silk, “Questionnaire Design and Development” (HBS 9-590-015)<sup>HBS</sup>            Reading: Christensen &amp; Olson, “<a href="#">Mapping Consumer’s Mental Models with ZMET</a>,” <i>Psychology &amp; Marketing</i>, (2002, 19, pp. 477-502)<sup>Portal</sup></p>

<sup>Portal</sup> Reading material with this notation can be found by clicking the appropriate link on the Portal.

<sup>HBS</sup> Reading material with this notation can be found in the course package available online from the Harvard Business School (see Required Online Resources above for link).

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- 4**                      **January 25**                      **What is a Brand?**  
Case: *Dove: Evolution of a Brand* (HBS 9-508-047)<sup>HBS</sup>  
Reading: Holt, "What Becomes an Icon Most?" *Harvard Business Review* (Mar 2003, reprint R0303B)<sup>Portal</sup>  
Reading: Edelman, "Branding in the Digital Age," *Harvard Business Review* (Dec 2010, reprint R1012C)<sup>Portal</sup>  
Reading: Hawkins, "The Case Method of Instruction"<sup>Portal</sup>
- 5**                      **February 1**                      **Creating Brands: Choosing Brand Elements**  
Case: *Saxonville Sausage Company* (HBS 2085)<sup>HBS</sup>  
Reading: Wansink, "[Using Laddering to Understand and Leverage a Brand's Equity](#)," *Qualitative Market Research: An International Journal* (2003, 6, 2, pp. 111-118)<sup>Portal</sup>  
Reading: Kohli, Leuthesser, & Suri, "[Got Slogan? Guidelines for Creating Effective Slogans](#)," *Business Horizons* (2007, 50, 5, pp. 415-422)<sup>Portal</sup>  
**Brand Audit Project proposal due at beginning of class session**
- 6**                      **February 8**                      **Creating Brands: Positioning and the Marketing Mix**  
Case: *Porsche: The Cayenne Launch* (HBS 9-511-068)<sup>HBS</sup>  
Reading: Keller, Sternthal, & Tybout, "Three Questions You Need to Ask About Your Brand," *Harvard Business Review* (Sep 2002, reprint R0209F)<sup>Portal</sup>  
Reading: Keller, "[Managing the Growth Tradeoff: Challenges and Opportunities in Luxury Branding](#)," *Journal of Brand Management* (Jan 2009, 16, 5/6, pp. 290-301)<sup>Portal</sup>
- 7**                      **February 15**                      **Creating Brands: Leveraging Secondary Associations**  
Case: *(Product) Red (A)* (HBS 9-509-013)<sup>HBS</sup>  
Reading: Keller, "[Brand Synthesis: The Multi-Dimensionality of Brand Knowledge](#)," *Journal of Consumer Research* (Mar 2003, 29, 4, pp. 595-600)<sup>Portal</sup>  
Reading: Berglind & Nakata, "[Cause-Related Marketing: More Buck Than Bang?](#)" *Business Horizons* (Sep 2005, 48, pp. 443-453)<sup>Portal</sup>
- February 19-23**                      **Family Day and Winter Reading Week (no classes)**
- 8**                      **March 1**                      **Managing Brand Equity: Repositioning and Extensions**  
Case: *EILEEN FISHER: Repositioning the Brand* (HBS 9-512-085)<sup>Commerce</sup>  
Reading: Aaker & Joachimsthaler, "[The Brand Relationship Spectrum](#)," *California Management Review* (Summer 2000, 42, 4, pp. 8-23)<sup>Portal</sup>  
Reading: Keinan, Avery, & Paharia, "[Capitalizing on the Underdog Effect](#)," *Harvard Business Review* (Nov 2010, reprint F1011B)<sup>Portal</sup>  
**Written case analysis due at beginning of class session**

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<sup>Commerce</sup> This case will be purchased by the Commerce Program and distributed to you in class as soon as it becomes available.



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- 9                      **March 8**                      **Managing Brand Equity: Building Customer Loyalty**  
Case: *Nectar: Making Loyalty Pay* (HBS 9-505-031)<sup>HBS</sup>  
Reading: Berman, “[Developing an Effective Customer Loyalty Program](#),” *California Management Review* (Fall 2006, 49, 1, pp. 123-148)<sup>Portal</sup>
- 10                      **March 15**                      **Guest Speaker: Anne Iarocci**  
*Note: This class session will take place from 6:30 – 8:30 pm (location TBA)*
- 11                      **March 22**                      **Managing Brand Equity: Integrated Communication Strategies**  
Case: *Red Bull* (UV2928)<sup>HBS</sup>  
Reading: Keller, “[Brand Equity Management in a Multichannel, Multimedia Retail Environment](#),” *Journal of Interactive Marketing* (May 2010, 24, pp. 58-70)<sup>Portal</sup>  
Reading: Armelini & Villanueva, “Adding Social Media to the Marketing Mix,” *IESE: Insight Magazine* (Jun 2011, pp. 29-36)<sup>HBS</sup>  
Reading: Muniz & Schau, “[How to Inspire Value-Laden Collaborative Consumer-Generated Content](#),” *Business Horizons* (2011, 54, pp. 209-217)<sup>Portal</sup>
- 12                      **March 29**                      **Brand Audit Project Presentations**  
*Brand Audit Report must be submitted at the beginning of class*  
*Final Examination case will be distributed at the end of class*
- TBA**                      **Final Examination**