

University of Waterloo
Department of Economics
ARBUS 303 / MGMT 345 Marketing Strategy
Winter 2024

Instructor Information

Instructor: Stephanie Villers
Office: HH 239
Office Hours: Monday 2:30 – 3:30 (in-person) or by appointment (virtually)
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Territorial Acknowledgement

We acknowledge that we are living and working on the traditional territory of the Attawandaron (also known as Neutral), Anishinaabeg, and Haudenosaunee peoples. The University of Waterloo is situated on the Haldimand Tract, the land promised to the Six Nations that includes six miles on each side of the Grand River.

Course Description

This course builds upon material covered in MGMT 244– Principles of Marketing. The focus is developing research designs, instruments, and methodologies to answer specific applied research questions and theories. You will develop analytical skills, apply decision tools, and learn frameworks that apply in developing practical marketing strategies.

Course Goals and Learning Outcomes

Upon completion of this course, students should be able to:

1. Apply the marketing concepts taught in ARBUS 302 / MGMT 244;
2. Develop skills in the areas of market analysis, marketing decisions and strategy formulation;
3. Apply skills in communicating analyses, persuasion, and making recommendations;
4. Develop strategic marketing skills for strategy creation, implementation, evaluation, and adaptation.

Course Format

Excepting the first class, the course format is generally as follows (see Tentative Lecture Schedule below for details):

- Class 1: Monday 11:30 – 12:50
 - In-class lectures (50 minutes); Case Analysis (30 min.) / Quiz (5 min)
- Class 2: Thursday 11:30 – 12:50
 - Capstone project meetings (50 min.); Virtual PPP - Problems, Progress, Plans (30 min.)

The lectures, readings, and capstone project are the basis of knowledge acquisition. Reading assignments and application tasks will provide the opportunity to learn the concepts and theories of various marketing research topics, and to apply this knowledge to real-world situations.

Readings

- **Cases (Required):** <https://www.iveypublishing.ca/s/ivey-coursepack/a1R5c00000FvVY0EAN>
- **Textbook (Recommended):** Roger A. Kerin, Steven W. Hartley, Arsenio Bonifacio, Donna Dumont, Carol Bureau (2021). Marketing the Core, 6th Canadian Edition, McGraw Hill. <https://www.mheducation.ca/marketing-the-core-9781260326949-can-group#configurable-product-options-title>. Do not purchase/rent the “Connect” option (not used in this course).

COURSE REQUIREMENTS AND ASSESSMENTS

The course will be supported in LEARN, and students are responsible for checking LEARN frequently to receive instructions. Any updates will be noted in announcements on the course home page.

Assessment	Weighting	Due
Participation <ul style="list-style-type: none"> • 10 classes (1% each) 	10%	Weekly
In Class Quizzes <ul style="list-style-type: none"> • Quiz 1 (5%) • Quiz 2 (5%) • Quiz 3 (5%) • Quiz 4 (5%) 	20%	January 22 February 5 February 12 March 4
<ul style="list-style-type: none"> • Makeup Assessment 		March 18
In-Class CCC Case Analysis <ul style="list-style-type: none"> • Dove (10%) • Lululemon (10%) • Canadian Blood Services (10%) • Karatu Coffee (10%) 	40%	January 15 January 29 February 26 March 11
Capstone Project Final Deliverables (30%)	30%	April 1 and April 3

Participation (10%)

The chat will record participation for any online classes via MS Teams (e.g., Guest Lecturers). Manual recording will be used for in-person classes. In appreciation of the fact that some people are introverted, there will be four recorders and four notetakers per class. Recorders are responsible for keeping track of people who participate by marking a checkmark on the sheets provided. Recorders give themselves and notetakers a star on the sheets provided to denote their participation mark for each class. Notetakers will supply recorders with class notes via email – the email must be received to count for a participation mark.

Students receive marks by answering questions raised in the lecture. One mark will be supplied per class, except in exceptional cases where the professor notes the allocation of a bonus mark (max one per class). Special pens will be supplied to notetakers. **Only checkmarks made by recorders with these ink colors will count toward participation marks.**

In-Class Quizzes (20%)

Each quiz will be completed on LEARN at some point during class. It will only be open for 10 minutes. Each quiz has 5 questions worth 1 mark each (2 minutes/question). You are only eligible for the make-up assessment if you have a VIF or UW Accommodation for a missed quiz.

In-Class CCC Case Analysis (40%)

Every other week, you will be assigned a case corresponding to the lecture topic. **You must read the case before class** and come prepared to analyze it for Comprehension (understand the organization), Connection (link case to lecture concepts), and Career (learn a skill used by marketing professionals). The Career component will be explained in class, so attendance is very important. Each CCC Case Worksheet is worth 10% of your final grade. **THE CCC IS DUE BY THE END OF CLASS.** Therefore, you are highly encouraged to complete the Comprehension portion before class. The “Late Penalty” applies 10 minutes after class ends.

Capstone Project (30%)

Irrespective of the option you select, **signed Acknowledgments must be submitted** to the appropriate Dropbox folder on LEARN. This is a legal requirement for participating in client-based experiential learning.

PICK ONE: Experiential Learning (Group) **OR** Strategic Market Plan (Individual)

1. **Experiential Learning “EL” (Group Project Option):** The class has been randomly assigned to sub-teams on Learn.
 - Instructions: Please see Learn – Contents – Capstone Project – “Experiential Learning Instructions”. Under the same folder, you can find a template for the Final Report and a Peer Evaluation Form (with sample grade distribution). If you do not complete the Peer Evaluation by the deadline, you are deemed to have given all members of your team 10/10.
 - Virtual PPP Meetings: One person from each EL team must join weekly meetings to provide the instructor with an update on the team’s Progress, Problems, and Plans. If your Project Manager cannot do so, they must appoint someone to attend.
 - Termination: To simulate the actual job of a marketing consulting firm, students can quit or be fired from the Experiential Learning project. The student will be transferred into the SMP alternative upon quitting or termination.
 - *Quitting:* Students can quit anytime on or before Capstone #6 with 24 hours written notice to your team and the instructor.
 - *Termination:* Students can be fired by majority vote after three communication attempts, three missed meetings, or if a team member fails to complete their prescribed tasks by a deadline agreed to by the group. Groups must notify the team member and the instructor of this termination. Members must be terminated on or before Capstone #6.
2. **Strategic Market Plan “SMP” (Individual Project Option):** When students quit or are terminated from the EL Team, they must switch to the SMP alternative (no credit given for previous work).
 - Instructions: Please refer to Learn – Contents – Capstone Project – “Strategic Marketing Plan”.
 - PPP Meetings: You are to submit written weekly reports on your Progress, Problems, and Plans to the Learn Dropbox called “SMP PPP”.

For options 1. and 2. above, a mark of -1 will be deducted from the Final Assessment for every missed PPP (up to 10 marks).

Students are provided 80 minutes of weekly class time for the Capstone Project. This is a *minimum* time commitment. The work is expected to be completed professionally and on time every week – even if that means working beyond the 80 minutes of class time provided. **Since class time is given weekly to work for your client, no extensions are permitted.** Failure to complete the capstone project will be treated the same as missing an exam.

Late Penalty

Students must complete each course assessment by the due date specified above. Excepting a VIF or UW “Accommodation” (<http://ugradcalendar.uwaterloo.ca/page/Acad-Regs-Accommodations>), late submissions are subject to 2 marks per day penalty. Late submissions will not be accepted more than five days past the specified due date, resulting in a grade of zero. **If you have a VIF, the missed assessment must be completed on the day after your VIF period ends.** No accommodation will be made after this time. The student is responsible for emailing the instructor (cc the TA) to arrange the completion of missed course components.

Course Policy on Generative AI

Students are encouraged to use generative AI, such as ChatGPT, to produce ideas for their client capstone projects (e.g., blog posts, social media content, SEO, etc.). Any AI-generated content for your client must be edited to reflect your own words and thoughts.

Using generative AI for CCC Analysis, Quizzes, Client Presentations, or any other course component in which you are required to produce your own original work is an academic offense. According to UWaterloo Guidelines, “Using ChatGPT (or similar tools that generate text, code, or visual images) for content generation and submitting it as one’s own original work is a violation of the [University of Waterloo’s Policy 71 \(Student Discipline\)](#).”

LECTURE SCHEDULE

DATE	TOPIC	RECOMMENDED	REQUIRED
Jan. 8	Introduction: Syllabus, Marketing Fundamentals	Chapter 1	--
Jan. 10	CAPSTONE #1 – Roles, Acknowledgements	PPP 1:50	
Jan. 15*	Marketing Mix: Promotion	Chapters 12-13	Dove
Jan. 17	CAPSTONE #2 – Weekly Deliverables Start	PPP 1:50	
Jan. 22*	Marketing Mix: Product	Chapters 7-8	Quiz #1
Jan. 24	CAPSTONE #3	PPP 1:50	
Jan. 29*	Marketing Mix: Price	Chapter 9	Lululemon
Jan. 31	CAPSTONE #4	PPP 1:50	
Feb 5*	Marketing Mix: Place	Chapter 10	Quiz #2
Feb 7	CAPSTONE #5	PPP 1:50	
Feb 12*	Market Research	Chapter 4	Quiz #3
Feb. 14	CAPSTONE #6 – SMP Transfer Deadline	PPP 1:50	
Feb 17 - 24	READING WEEK	NO CLASSES	
Feb 26*	Consumer Behaviour (Bonus)	Chapter 3	CBS
Feb 28	CAPSTONE #7	PPP 1:50	
Mar. 4*	Getting Customers: STP	Chapter 6	Quiz #4
Mar. 6	CAPSTONE #8	PPP 1:50	
Mar. 11*	Marketing Environment: SWOT, PEST, Porters	Chapter 2	Karatu Coffee
Mar. 13	CAPSTONE #9	PPP 1:50	
Mar. 18*	CSR & CRM	Chapter 14	Make-Up
Mar. 20	CAPSTONE #10	PPP 1:50	
Mar. 25*	Careers: Guest Lecturer	MS Teams Link	
Mar. 27	CAPSTONE #11	PPP 1:50	
Apr. 1	CAPSTONE Final Client Presentations	In-Class	
Apr. 3	CAPSTONE Final Client Presentations	In-Class	

* Participation Class

UNIVERSITY POLICIES

Course Modification Warning: The instructor and university reserve the right to modify course elements during the term. The University may change the dates and deadlines for all courses in extreme circumstances. If either modification becomes necessary, reasonable notice and communication with the students will be given with an explanation and the opportunity to comment on changes. The student is responsible for checking their UWaterloo email and course website on LEARN daily during the term and noting any changes.

Academic Integrity

- **Academic Integrity:** To maintain a culture of academic integrity, members of the University of Waterloo are expected to promote honesty, trust, fairness, respect, and responsibility. See the UWaterloo Academic Integrity webpage and the Arts Academic Integrity webpage for more information.
- **Discipline:** A student is expected to know what constitutes academic integrity, to avoid committing academic offenses, and to take responsibility for his/her actions. A student unsure whether an action constitutes an offense or needs help learning how to avoid offenses (e.g., plagiarism, cheating) or about “rules” for group work/collaboration should seek guidance from the course professor, academic advisor, or the Undergraduate Associate Dean. When misconduct has been found to have occurred, disciplinary penalties will be imposed under Policy 71 – Student Discipline. For information on categories of offenses and types of penalties, students should refer to Policy 71 - Student Discipline. For typical penalties, check the Guidelines for the Assessment of Penalties.
- **Grievance:** A student who believes that a decision affecting some aspect of his/her university life has been unfair or unreasonable may have grounds for initiating a grievance. Read Policy 70 - Student Petitions and Grievances, Section 4. When in doubt, please contact the department’s administrative assistant, who will further assist.
- **Appeals:** A decision made or penalty imposed under Policy 70 - Student Petitions and Grievances (other than a petition) or Policy 71 - Student Discipline may be appealed if there is a ground. A student who believes he/she has a ground for an appeal should refer to Policy 72 - Student Appeals.

Cross-listed courses

Please note that a cross-listed course will count in all respective averages no matter under which subject code it has been taken. For example, a PHIL/PSCI cross-list will count in a Philosophy major average, even if the course was taken under the Political Science subject code.

Accommodation for Students with Disabilities: The AccessAbility Services office, located on the first floor of the Needles Hall extension (1401), collaborates with all academic departments to arrange appropriate accommodations for students with disabilities without compromising the academic integrity of the curriculum. If you require academic accommodations to lessen the impact of your disability, please register with the AS office at the beginning of each academic term.

Chosen/Preferred First Name: Do you want professors and interviewers to call you by a different first name? Take a minute to verify or tell us your chosen/preferred first name by logging into [WatIAM](#). Why? Starting in winter 2020, your chosen/preferred first name listed in WatIAM will be used broadly across campus (e.g., LEARN, Quest, WaterlooWorks, WatCard, etc). Note: Your legal first name will always be used on certain official documents. For more details, visit [Updating Personal Information](#).

- If you included a preferred name on your OUAC application, it will be used as your chosen/preferred name unless you change it now.
- If you don’t provide a chosen/preferred name, your legal first name will continue to be used.

Mental Health Supports: All of us need a support system. The faculty and staff in Arts encourage students to seek out mental health supports if they are needed.

- On Campus
 - Counselling Services: counselling.services@uwaterloo.ca / 519-888-4567 ext. 32655
 - MATES: one-to-one peer support program offered by the Federation of Students (FEDS) and Counselling Services
 - Health Services Emergency service: located across the creek from Student Life Centre
- Off campus, 24/7
 - Good2Talk: Free, confidential helpline for post-secondary students. Phone: 1-866-925-5454
 - Grand River Hospital: Emergency care for a mental health crisis. Phone: 519-749-433 ext. 6880
 - Here 24/7: Mental Health and Crisis Service Team. Phone: 1-844-437-3247
 - OK2BME: a set of support services for lesbian, gay, bisexual, transgender, or questioning teens in Waterloo. Phone: 519-884-0000 extension 213

Full details can be found online at the Faculty of ARTS website Download UWaterloo and regional mental health resources (PDF) Download the WatSafe app to your phone to quickly access mental health support information.

Intellectual Property: Students should know that this course contains the intellectual property of their instructor, TA, and/or the University of Waterloo. Intellectual property includes items such as:

- Lecture content, spoken and written (and any audio/video recording thereof);
- Lecture handouts, presentations, and other materials prepared for the course (e.g., PowerPoint slides);
- Questions or solution sets from various types of assessments (e.g., assignments, quizzes, tests, final exams); and
- Work protected by copyright (e.g., any work authored by the instructor or TA or used by the instructor or TA with permission of the copyright owner).

Course materials and the intellectual property contained therein are used to enhance a student's educational experience. However, sharing this intellectual property without the intellectual property owner's permission violates intellectual property rights. For this reason, it is necessary to ask the instructor, TA and/or the University of Waterloo for permission before uploading and sharing the intellectual property of others online (e.g., to an online repository).

Permission from an instructor, TA, or the University is also necessary before sharing the intellectual property of others from completed courses with students taking the same/similar courses in subsequent terms/years. In many cases, instructors might be happy to allow distribution of certain materials. However, doing so without expressed permission is considered a violation of intellectual property rights. Please alert the instructor if you become aware of intellectual property belonging to others (past or present) circulating through the student body or online. The intellectual property rights owner should know (and may have already consented).