ORFALEA COLLEGE OF BUSINESS
CALIFORNIA POLYTECHNIC STATE UNIVERSITY

BUS 454: Marketing Projects
Fall 2015

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Class Time: TR 2:10pm-4:00pm

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Office Hours: Thursdays 12:00–2:00 p.m. and by appointment

Course Description

Client-based course providing students with an opportunity to apply their marketing abilities. Student teams utilize research, analytical, and strategic marketing skills to develop an actionable plan that addresses a marketing challenge faced by an organization. Deliverables include research findings, as well as written and verbal presentations to the organization and instructor. 4 lectures.

Course Objectives

When you complete BUS 454, you should be able to:

1. Write a statement of work and a project plan (schedule) that your client buys into
2. Establish team norms that enable you to meet project milestones
3. Present and defend your marketing recommendations
4. Develop a client relationship and manage your client's expectations

Your Commitment

- Think of this as your first professional consulting assignment. Successful students spend a minimum of 12-16 hours per week on their projects.
- Most students view this experience as an internship and work hard to achieve excellent results for their clients because they know they can use the experience and the completed report as powerful interview tools.
- Your professor has put her own professional reputation on the line with these clients.

What materials do I need to buy for BUS 454?

1. *The Art of Client Service by* Robert Solomon
2. *Business Model Generation* by Alexander Osterwalder & Yves Pigneur

Course Policies

Academic Standards. Section 684 of the Campus Administrative Manual states, "The University will not condone academic cheating or plagiarism in any form." Cheating on or plagiarizing the work of others will result in a zero for that assignment.

Announcements. Monitor the News Forum area of the course site on PolyLearn. Information posted to this area is an official addition to the class syllabus.

Disability Services. It is University policy to provide, on a flexible and individualized basis, reasonable accommodations to students who have disabilities that may affect their ability to participate in course activities or to meet course requirements. If you have a disability for which you are or may be requesting an accommodation, you are encouraged to contact both your instructor and the Disability Resource Center, Building 124, Room 119, at (805) 756-1395, as early as possible in the term.

Late Assignments. Part of the assessment on assignments is the ability to complete them in a timely manner. Expect to receive half credit for late work.

Student Privacy. This course uses tools that will display students' full names and email addresses. If you have chosen to protect your Directory Information (which includes name and email), yet you want to receive job or internship information, you must let me know in writing.

How will my grade be computed?

Individual Assignments	30%
▪ I1: Blog The Art of Client Service	▪ 5%
▪ I2: Post research to team Google Doc	▪ 25% (5@5%)
Team Assignments	70%
▪ T1: Team coordination document	▪ 5%
▪ T2: Statement of work	▪ 5%
▪ T3: Project plan	▪ 7.5%
▪ T4: **Get Smart Fast®** research questions	▪ 5%
▪ T5: Client briefing	▪ 7.5%
▪ T6: Draft of final report	▪ 20%
▪ T7: Final report	▪ 5%
▪ T8: Dry run of client presentation	▪ 5%
▪ T9: Client presentation	▪ 10%

Personal accountability for the team's work is essential. This means that the peer evaluation process and client feedback are important factors in determining individual grades on T6-T10. Team scores for T6-T10 are typically entered as placeholders and adjusted, when necessary, at the end of the quarter.

Project Clients

Clients are typically startups, founded by entrepreneurs from Cal Poly or the local community. Project sponsors expect

- to benefit from a well-executed project
- you to act professionally, respect their time, organizations, and confidentiality.

Remember, "Cal Poly time" has no meaning in the business world; if you say that you'll call at 11:00, do so promptly at 11:00.

I'll speak with each client at the end of the quarter to ascertain his/her satisfaction with the project and team members. This feedback may be used to adjust your final course grade.

How teams are formed: I'll organize the class into project teams. Rank your preferences for **all** projects: 1= most preferred. Identify prior experience or special skills that you bring to **each** of the projects.

Client Meetings:

Prior to 1st client meeting	Review all of the materials you may have received in class or posted to your team's folder in PolyLearn, as well as the client's Web site. You should be able to summarize the client's product/market on the back of a business card.
First client meeting	Introduce your team members Confirm your client's project goals and objectives Confirm what your client would like to have in hand at the conclusion of the project
Weekly client updates	It's important to keep your client in the loop and to manage his/her expectations. Depending on what you need to review with your client, these can be face-to-face, e-mail, Skype, or phone.
Client attends 1 coaching session	Check the course calendar
Final client meeting	Your client will attend your final presentation during finals week

Weekly Briefings with your Course Coach (I2.1-I2.5): How do I prepare?

For I2.1: Post your research to your team's Google doc on the dates and times indicated in the course calendar below. **I will go through the different versions of the Google Doc to look for evidence of 12 hours of work per week per team member.**

For I2.2-I2.5: Each team member should keep a running log of his or her work, demonstrating progress on the team's deliverables. See PolyLearn for examples of good and failing progress. Post the most recent material at the top of the log (so, at the end of the quarter, I2.5 is at the **top** of your log). **Remember, I look for evidence of 12 hours of work per week per team member.**

How are I2 assignments scored?
Quality and time spent. Review the weekly briefing scorecard on your Google Site > Files. You may want to log your time.

- A = superior rating on weekly briefing scorecard AND 12+ hours of quality work (accomplishes deliverables) per week.
- B = good rating on weekly briefing scorecard AND 10-12 hours of quality work
- C = acceptable rating on weekly briefing scorecard AND 8-10 hours of quality work
- D = acceptable rating on weekly briefing scorecard AND 5-7.5 hours of quality work
- F = unacceptable rating on weekly briefing scorecard AND less than 5 hours of work per week

Examples of things you might include in your log
- Analysis and summary of materials from secondary research
- Spreadsheets with completed benchmarking results
- Analysis of completed interviews or surveys
- Prototypes or mock-ups of creative materials
- Lists of contacts, along with contact dates, & upcoming appointments

An oral update without supporting evidence posted to the team's Google Doc is not sufficient. During your briefing, be prepared to discuss
- Results since the last coaching session and progress on key deliverables
- Specific areas where you need guidance

In order to make data-driven recommendations, you'll all need to line up people to participate in your research. Successful students start networking to identify respondents immediately. They call leads, are pleasantly persistent, and follow through to confirm appointments.

I am happy to review drafts of your interview guides and surveys that have been
- Checked for spelling and grammar
- Well formatted
- Sent to me at least 24-hours prior to your coaching session, either by 4:00 p.m. Sunday or Tuesday evening, depending on what day we meet.

Take advantage of the feedback. It's there to help you.

Final Reports and Presentations (T6 and T8)

How do we prepare our "best effort" draft and also our final report?
Best Effort Draft of Final Report in Word.doc or Word.docx format is due Tuesday, 11/10 at 4:00 p.m.

- Prepare your best effort draft according to the format guidelines posted on PolyLearn.
- Include results of all phases of your research up to the current date.
- Make the report useful to your client. Key points should "pop." **Bulleted lists, comparative tables, charts and graphs are much more useful than long paragraphs.**
- Proofread your report after you've run spell check.

I will provide constructive feedback that you can use to fine-tune the final document (T7). **The end of the quarter is still 2 weeks away, so you will have final phases and findings to incorporate into the final version of your document.**

Evaluation Criteria for Draft of Final Report (T6):

- ***Exemplary:*** Exceptionally thoughtful analysis. Insightful recommendations that demonstrate deep understanding of the client and its customer base and that address the marketing issues the client identified. Strength in organization, development, and expression. Report reads as if written by a single individual. Follows format instructions. "Great work, like good work, is on [target]. But it's beyond smart; it's something rare and special." p.42 Robert Solomon (2003) *The Art of Client Service*
- ***Proficient:*** Good work. Well-developed analysis. Recommendations are on target. Effective paragraph & sentence structure. Report reads as if written by a single individual. Follows format instructions.
- ***Unsatisfactory:*** Exhibits one or more of the following characteristics. Points out the obvious. Recommendations based on personal opinion – no analysis, no supporting data. Inadequate organization, development and/or expression. Problems with grammar. Obvious inconsistencies in writing style and quality of work. Does not follow format instructions.

How do we prepare for our final presentation?
Each team will schedule a one-hour time slot with me to **fine-tune** its client presentation. **This should be your best effort and follow the format guidelines posted to PolyLearn**. Your client is the audience for your presentation. This means you should speak to (look at) your client. Business casual attire is required for your final presentation.

Evaluation Criteria for Dry-Run of Client Presentation (T8):

- ***Exemplary:*** Slides follow the format guidelines posted to PolyLearn, are visually appealing, and free of typos. Minimum size font is 24 point. Careful consideration given to casting the presenters, with an eye to who can best deliver the material. Every slide and word is meaningful.
- ***Unsatisfactory:*** Exhibits one or more of the following characteristics. Typos on slides. Slides are cluttered, difficult to read. Presenters provide vague and/or inadequate explanation.

Course Calendar[1]

Tues.	9/22	**Course Overview** **Client Presentations** **Homework:** 1. Read your syllabus. 2. Review the project briefs. 3. Get a Gmail address if you don't have one. You will need this information to complete the Project Preference Survey. 4. Complete the Project Preference Survey by 9:00 p.m. this evening. Rank order your preferences for **all** projects: 1= most preferred. Identify prior experience or special skills that you bring to **each** of the projects. 5. I1: Read *The Art of Client Service.* Write about the concepts you find most relevant for this course, for your current job, and your future careers. There's no need to summarize the concepts. Write about personal application and impact. The rubric is posted to PolyLearn. Upload the assignment to PolyLearn on **Sunday, 9/27 at 11:59 p.m.**
Thurs.	9/24	**Topic: Team Coordination and Statement of Work** **In-Class:** 1. Introduce yourselves and exchange contact information. 2. Review your team's project brief and project goals. a. T1: Complete the team coordination document and post it to your team's Google Site > Team Coordination by **noon on Sunday, 9/27**. Share with lynn.metcalf@gmail.com b. T2: Begin to draft a statement of work. For instructions, go to your team's Google Site > Statement of Work. Post your Statement of Work to your team's Google Site > Statement of Work by **noon on Sunday, 9/27**. Share with lynn.metcalf@gmail.com
Sun.	**9/27**	T1: Post Team Coordination Document to Google Site > Team Coordination by **noon**. Share with: lynn.metcalf@gmail.com T2: Post Statement of Work to Google Site > Statement of Work by **noon**. Share with: lynn.metcalf@gmail.com I1: Submit Art of Client Service assignment via PolyLearn by **11:59 p.m.**

[1] Subject to change. This represents my best estimate of how the quarter will play out.

Tues.	9/29	**In-Class: Project Plan + Get Smart Fast®** 1. Review comments on your Statement of Work and revise, if necessary 2. T3: **Project Plan** a. Discuss how you'll approach the project with a member of the teaching team. Determine the types of research you'll need to conduct in order to support the recommendations you need to make. Prepare a project plan that details all aspects of the project. If parts of the project seem unclear, then ask questions to ensure you're on the right track. b. Create your project plan in a Google spreadsheet. Link it to Google Site > Files by **Monday 10/5 at 2:00 p.m.** Share with: lynn.metcalf@gmail.com 3. T4: **Get Smart Fast®.** Your client already knows a lot about his or her industry. You need to immerse yourselves so that you're looking at the industry from your client's perspective. What information do you need to know about the industry your company competes in, its customers, its competitors and how your company and its products stack up? a. Compose a list of research questions. You might want to write questions on post-it notes so that you can organize into categories later. b. For help on developing a list of secondary research questions, refer to pp. 202, 204, and 206 + pp. 20-29 in *Business Model Generation*. For help on developing a set of primary research questions, refer to pp. 130-133 of *Business Model Generation*. c. Organize your list of questions. i. First, divide the list into 2 sections: (1) secondary research questions and (2) primary research questions. ii. Next, group questions by topic. d. Link it to your team's Google Site > Files by **11:59 p.m. on Wed, 9/30.** Share with: lynn.metcalf@gmail.com
Thurs.	10/1	**In-Class: Get Smart Fast® Research** 1. Review comments on your **Get Smart Fast®** research questions**.** 2. Complete secondary research, using Top 10 resources + Advanced Google Search. 3. Create team Google Docs and develop outlines for them. Start with the broadest or most general information and its specific impact on your client's business. End with more specific topics. a. Key trends b. Competitor profiles c. Customer profile(s) 4. Write up your individual research findings and insert them into the team Google Document. Group related trends. Combine similar information. Post to Google Site > Files by **Monday 10/5 at 2:00 p.m**. Share with: lynn.metcalf@gmail.com Remember, I will be going through Google Doc versions looking at individual contributions. Review the personal work / contribution rubric on Google Site > Files.

Mon.	**10/5**	**Due by 2:00 p.m.** T3: Post Project Plan to Google Site > Tasks OR create Google spreadsheet and link it to Google Site > Files. Share with: lynn.metcalf@gmail.com I2.1: Insert your individual research findings into the team Google Document posted to your team's Google Site > Files. Group related trends. Combine similar information. Share with: lynn.metcalf@gmail.com
Tues.	10/6	**In-Class: Review Project Plans + Get Smart Fast® Research** 1. Review feedback on T3. Work with a member of the teaching team to make revisions, if necessary. 2. Review feedback on I2.1. Make revisions and do additional research, if necessary. 3. Begin to develop interview or survey questions for primary research instruments. **Homework for Client Meeting** 1. Brush up your resume so that you can take a copy to your client meeting
Thurs.	10/8	**ALL TEAMS: Meet with your client by close of business today** 1. Introduce yourselves. 2. Review the statement of work with your client. If there's agreement on the document, have the client sign off on the statement of work at this meeting. If you need to discuss further with me, then establish a meeting with the client next week to review and sign the statement of work. 3. Make sure you come away from this meeting with a clear understanding about what the client wants to accomplish, what they expect from you, and how they want to communicate and interact with you. 4. Pencil in meetings and location for the entire quarter.
Tues.	10/13	**I2.2 due at 11:59 p.m. Sunday, 10/11** Team Meetings / Coaching Sessions
Thurs.	10/15	**I2.2 due at 11:59 p.m. Tuesday, 10/13** Team Meetings / Coaching Sessions
Tues.	10/20	**I2.3 due at 11:59 p.m. Sunday, 10/18** Team Meetings / Coaching Sessions
Thurs.	10/22	**I2.3 due at 11:59 p.m. Tuesday, 10/20** Team Meetings / Coaching Sessions
Tues.	10/27	**I2.4 due at 11:59 p.m. Sunday, 10/25** Team Meetings / Coaching Sessions **Client attends**

Thurs.	10/29	**I2.4 due at 11:59 p.m. Tuesday, 10/27** Team Meetings / Coaching Sessions **Client attends**
Tues.	11/3	**I2.5 due at 11:59 p.m. Sunday, 11/1** Team Meetings / Coaching Sessions
Thurs.	11/5	**I2.5 due at 11:59 p.m. Tuesday, 11/3** Team Meetings / Coaching Sessions
Tues.	11/10	**T6: Best Draft of written report due via e-mail at 4:00 p.m.** Review syllabus and the format instructions on Google Site > Tools
Thurs.	11/12	**ALL TEAMS WORK**
Tues.	11/17	Team Meetings / Coaching Sessions: **Review written reports**
Thurs.	11/19	Team Meetings / Coaching Sessions: **Review written reports**
Tues.	11/24	**ALL TEAMS MEET IN 03-114** Work on presentations
Thurs.	11/25	**Thanksgiving Day Holiday**
Tues.	**12/1 11-12**	**T8: Dry-run client presentations** Review syllabus & the format instructions on Google Site > Tools
Tues.	12/1	**T8: Dry-run client presentations** Review syllabus & the format instructions on Google Site > Tools
Thurs.	**12/3 11-12**	**T8: Dry-run client presentations** Review syllabus & the format instructions on Google Site > Tools
Thurs.	12/3	**All revised drafts due at 7:00 a.m. this morning** **T8: Dry-run client presentations** Review syllabus & the format instructions on Google Site > Tools
Due 9:00 a.m. **Tues. 12/8**		**Homework for final client presentation:** 1. Submit peer evaluations on PolyLearn 2. For your client: a. Transfer everything (surveys, interview transcripts, T7 final report, T9 presentation, and T10) to a flash drive. Label your flash drive. b. Print presentation handout for all client representatives 3. For me: a. E-mail your presentation to me: lmetcalf@calpoly.edu. b. Hand me your flash drive at the beginning of our finals session, so that I can transfer everything onto my laptop.

Tues.	12/8	**4:00 – 7:00 Client Presentations**