

ICE Marketing (Blocks 5 & 6)

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Course Summary

Welcome to Marketing! This course is focused on the discipline's first law:

“Don't sell what you happen to make; make what the consumer wants to buy” [Fennell, 1978, p. 38].

Structured according to 4 Ps (product, price, promotion, and place), our class sessions will hone your ability to apply critical thinking skills to the managerial decisions being asked of marketers in today's information-based economy. Conceptualizing marketing as the act of generating, disseminating, and responding to market intelligence [Kohli and Jaworski, 1990] will allow us to discuss how marketing can be practiced organization-wide to attain a market orientation and optimize the triple bottom line for profits, people, and the planet [Elkington].

This website includes the daily schedule for our class sessions, as well as outlines for the presentations your group can choose from and the midterm project.

Part I

Daily Schedule

Thursday, October 10

Topic

- Course Outline and Midterm Launch

Objectives

- To outline how our subsequent sessions will cover the broad discipline of marketing, a discipline that at its core is about processing information and making decisions to optimize the triple bottom line
- To learn how you can focus on work that is grand, novel, curiosity-inducing, broad in scope, and actionable to give the projects you dedicate time to as well as your career momentum out of the gate

Readings

- Market Orientation: The Construct, Research Propositions, and Managerial Implications [Kohli and Jaworski, 1990]
- Eager Sellers and Stony Buyers [Gourville, 2006]
- Midterm Project Outline

Discussion Questions

1. What major constituents make up a company's external environment?
2. What does the term "market orientation" mean?
3. Describe the three types of information-processing activities that market-oriented companies engage in.
4. What are some potential positive and negative consequences of a market orientation?
5. In what contexts might a market orientation be less important to a company's performance?

Assignments Due

- Answers to today's discussion questions

- Print the readings for each class session of Marketing and organize them in a binder

Assignments Made

- Answers to the discussion questions for Marketing on Wednesday, October 16
- Midterm Presentation Sign-up Sheet
 - Choose a three-minute presentation slot by inputting your first name, last name, and computing ID
 - Leave your presentation title blank for now
- Group Presentation Sign-up Sheet
 - As a group, choose one of the following group presentations
 - The sign-up sheet will become available tonight at 6:00 pm
 - Each presentation can be selected by two groups

Deliverable	Due Date	AssignmentType	Percentage of COMM 3020
J.C. Penney Case Report	Thursday, October 31	Individual	1 bonus point
JUST (A) Case Report	Wednesday, November 6	Individual	1 bonus point
Midterm Report	Wednesday, November 13	Individual	10%
Midterm Presentation	Wednesday, November 13	Individual	5%
Hubspot Case Report	Wednesday, November 20	Individual	1 bonus point
Starbucks Case Report	Tuesday, November 26	Individual	1 bonus point
Formula Complete Fitness Presentation	Thursday, October 31	Group	5%
Hard Discounters vs. Online Orders Presentation	Thursday, November 14	Group	5%
MarieBette Presentation	Thursday, November 21	Group	5%
JUST (B) Presentation	Monday, December 2	Group	5%

Wednesday, October 16

Topic

- Generating Market Intelligence

Objectives

- To discuss how you can generate market intelligence, such as consumer insights, effectively (i.e., reproducibly, accurately, and collaboratively)
- To increase the degree to which you are prepared to leverage business case studies to (a) simulate the experience of decision making and (b) sharpen your critical thinking skills

Readings

- Rediscovering Market Segmentation [Yankelovich and Meer, 2006]
- Opinionated Analysis Development [Parker, 2017]
- Case Report Rubric

Discussion Questions

1. How have you personally gone about searching for people in their 30s and 40s (i.e., born between 1960 and 1989) that are likely to be susceptible to the Margaritaville brand or underserved / dissatisfied in some way that Margaritaville could address profitably with a new initiative?
2. Where has your search and those of your group members led your group? In other words, what are the most common demographic, behavioral, and attitudinal characteristics of the people that your searches have turned up?
3. What qualities (e.g., product attributes) does your group's initiative need to have for the people in your target market to be receptive to it?
4. What type of relationship do people tend to form with the product or service that your group is proposing to launch? Draw on the *gravity of decision spectrum* tool advanced by Yankelovich and Meer [2006] for your answer.

Assignments Due

- Answers to today's discussion questions
- Midterm Presentation Sign-up Sheet

- Group Presentation Sign-up Sheet

Assignments Made

- Answers to the discussion questions for Marketing on Thursday, October 17

Thursday, October 17

Topic

- Disseminating Market Intelligence

Objective

- To discuss how radical truthfulness and radical transparency can help companies and work groups create idea meritocracies that will refine the market intelligence they generate through the dissemination process

Readings

- Principles [Dalio, 2017, pp. 318-369]
 - Principles is free for iPhone users

Discussion Questions

1. Dalio [2017] argues that “radical truth and radical transparency are fundamental to having a real idea meritocracy” (p. 323). How can being radically truthful and radically transparent help a company disseminate market intelligence more effectively and efficiently?
2. Vote at least ten times on this wiki survey. Then, choose five principles from today’s reading that you are most interested in implementing with your group. Why these principles and not others that are in the reading?

Assignments Due

- Answers to today’s discussion questions

Assignments Made

- A response to the discussion question for Marketing on Wednesday, October 23

Wednesday, October 23

Topic

- Responding to Market Intelligence

Objective

- To introduce the concept of a value model and explore how you can use value models to systematize your decision-making about strategic changes to marketing-mix variables

Readings

- How to Make a Big Decision [Johnson]
 - You can access this article by searching Factiva for: `rst=nytf` and `how to make a big decision`

Discussion Question

1. What are the key advantages of creating a value model relative to making a list of pros and cons?

Assignments Due

- A response to today's discussion question

Assignments Made

"I hear and I forget. I see and I remember. I do and I understand." - Confucius

- Answers to the discussion questions for Marketing on Thursday, October 24
- A group discussion of your analysis of the J.C. Penney case before Marketing on Thursday, October 24. As you prepare for and engage in your group discussion, you might find it helpful to consider the following guidelines that Haywood-Farmer [2008] suggests adhering to:
 - Develop a thorough understanding of the case prior to your group meeting
 - Participate actively in the discussion and take your own notes (consensus is neither necessary, nor expected)
 - Set a time limit, say 30 minutes, for your discussion and stick to it

Thursday, October 24

Topic

- J.C. Penney Case Discussion

Objectives

- To begin developing your ability to argue for and against managerial decisions in a persuasive manner through deliberate practice
- To understand why a change in J.C. Penney's pricing strategy affected its revenue and profitability
- To learn how you can assess the likely effectiveness of a Hi-Lo versus EDLP pricing strategy, given a company's external environment

Readings

- J.C. Penney's "Fair and Square" Pricing Strategy [Ofek and Avery, 2013]
- The Discipline of Business Experimentation [Thomke and Manzi, 2014]

Discussion Questions

1. Read the case quickly and skim through its fourteen exhibits to identify one or two high-level concerns, problems, or issues that J.C. Penney faced in August of 2012. Describe them concisely. What might have caused them, and when does a decision need to be made?
2. Re-read the case more carefully to become acquainted with facts and opinions that are relevant to the concerns, problems, or issues you identified above. As you re-read the case, catalog information presented in the case and arrange it in a systematic order from most to least important.
3. Generate and evaluate alternative courses of action for J.C. Penney.
4. How should Johnson proceed? Recommend a general action plan.
5. Reflect on the time you dedicated to preparing for today's discussion of the J.C. Penney case. How much time did you spend, and how could you develop skills that will enable you to prepare more wisely? Refer to page 3 of Haywood-Farmer [2008] for ideas.

Assignments Due

"I hear and I forget. I see and I remember. I do and I understand." - Confucius

- Answers to today's discussion questions
- A group discussion of your analysis of the J.C. Penney case before today's class. As you prepare for and engage in your group discussion, you might find it helpful to consider the following guidelines that Haywood-Farmer [2008] suggests adhering to:
 - Develop a thorough understanding of the case prior to your group meeting
 - Participate actively in the discussion and take your own notes (consensus is neither necessary, nor expected)
 - Set a time limit, say 30 minutes, for your discussion and stick to it

Assignments Made

- J.C. Penney Case Reflection (due Wednesday, October 30)
- Answers to the discussion questions for Marketing on Wednesday, October 30
- A group discussion of your analysis of the JUST (A) case before Marketing on Wednesday, October 30
- J.C. Penney Case Report (for bonus participation credit only; due Thursday, October 31)

Wednesday, October 30

Topic

- Just (A) Case Discussion

Objective

- To discuss when and how companies can overcome consumers' lay theories about product attributes (e.g., tasty = unhealthy)

Readings

- Just: Positioned to Target Mainstream Tastes? (A) [Yemen et al., 2018a]
- Food Marketing [Gibson et al., 2018]

Discussion Questions

1. Read the case and its technical note on food marketing quickly, keeping the following lay theories that consumers tend to use as rules of thumb when they make decisions about food in the back of your mind: **inexpensive = unhealthy**, **healthy = not tasty**, and **sustainable = not tasty** [Haws et al., 2017, Raghunathan et al., 2006, van Doorn and Verhoef, 2011]. Given JUST's mission to "develop better-tasting, healthier, and more sustainable foods from plants, then distribute them intensively across a wide variety of grocery and food retail stores at an affordable price" [Yemen et al., 2018a, p. 2], these lay theories present obstacles that need to be circumvented. Take ten minutes to free write about them. That is, write without regard to grammar, sentence structure, or spelling, and leave your response to this question unpolished after ten minutes is up. This activity should increase your understanding of the topics and get your ideas flowing.
2. Is JUST Mayo radically better than other mayonnaise in terms of its tastiness, affordability, healthiness, and sustainability? How does it fare against market-share leaders on these product attributes? Answering these questions will require you to collect data and, therefore, to go beyond the information presented in the readings. Focus on **one** product attribute in your response (the choice is yours), get creative, and be resourceful.
3. Given your responses to Q1 and Q2, what trade-offs and realities should JUST's team be conscious of as they work to increase consumers' perceptions of JUST Mayo along the product attributes of tastiness, affordability, healthiness, and sustainability. As [Porter, 1996] describes, "a trade-off means that more of one thing necessitates less of another" (p. 68). Exposing the trade-offs and relative (dis)advantages

that exist in a product category is the first step to uncovering the unique competitive position that a company should strive for.

4. What characteristics does JUST Mayo need to have for it to carve out real estate in consumers' minds as the best tasting, most affordable, healthiest, and most sustainable mayonnaise in the grocery store? In particular, focus on how JUST could lay claim to this ideal competitive position by making additional changes to JUST Mayo's packaging. If your analysis suggests that this ideal competitive position is *not* achievable, focus on making changes to JUST Mayo's packaging that will highlight product attributes that JUST *can* hang its hat on.

Assignments Due

- J.C. Penney Reflection
- Answers to today's discussion questions
- A group discussion of your analysis of the JUST case before today's class

Assignments Made

- JUST Case Reflection (due Thursday, October 31)
- Answers to the discussion questions for Marketing on Thursday, October 31
- JUST Case Report (for bonus participation credit only; due Wednesday, November 6)

Thursday, October 31

Topic

- Formula Complete Fitness Presentations

Objective

- To segment the male UVA student population, identify a target market for Formula Complete Fitness, and determine how Formula can serve this market more effectively

Readings

- None

Discussion Questions

Formula Complete Fitness is a treadmill studio that offers group exercise classes to the Charlottesville community from its location on the corner of Preston Avenue and 10th Street NW. At least four fifths of its clients are female, and Formula is interested in increasing the number of male UVA students that make use of its classes. In an effort to help Formula increase its reach, sift through the UVA student population for males who are likely to be susceptible to the group fitness classes that Formula offers or are underserved/dissatisfied in some way that Formula could address profitably.

1. How did you conduct your search and where did it lead you? In other words, what are the most common demographic, behavioral, and attitudinal characteristics of the students that your search turned up?
2. What qualities (e.g., product attributes) does a fitness class need to have for the male students in your chosen target market to be receptive to it?
3. Develop a brief action plan that Formula could implement to reach your chosen target market more effectively.

Assignments Due

- JUST Case Reflection
- Answers to today's discussion questions
- J.C. Penney Case Report (for bonus participation credit only)
- Formula Complete Fitness Presentation (for presenting groups only)

Assignments Made

- Midpoint Course Evaluation (due on Wednesday, November 6 at 7:00 pm)
 - Midpoint Course Evaluation Survey
 - Pledge Survey
- Answers to the discussion questions for Marketing on Wednesday, November 6
- A group discussion of your analysis of the Hubspot case before Marketing on Wednesday, November 6

Wednesday, November 6

Topic

- Hubspot Case Discussion

Objective

- To learn how you can use the CLV formula for targeting decisions

Readings

- Hubspot: Inbound Marketing and Web 2.0 [Steenburgh et al., 2017]
- Marketing Analysis Toolkit: Customer Lifetime Value Analysis [Steenburgh and Avery, 2017]

Discussion Questions

1. What decision needs to be made in the Hubspot case, and what alternatives should Halligan and Shah be considering? Arrive at three alternatives, with one being to maintain the status quo.
2. Assuming a zero percent discount rate, what is the customer lifetime value of an Owner Ollie? Show your work.
3. Assuming a zero percent discount rate, what is the customer lifetime value of a Marketer Mary? Show your work.
4. Building on your answers to Q2 and Q3, if Halligan and Shah had \$100,000 to spend on customer acquisition, who should they spend it on, Ollies or Marys? Show your work.
5. What direction does your research suggest Halligan and Shah should go in? Build an argument for your decision.

Assignments Due

- Answers to today's discussion questions
- A group discussion of your analysis of the Hubspot case before today's class
- JUST Case Report (for bonus participation credit only)

- Midpoint Course Evaluation (due tonight at 7:00 pm)
 - Midpoint Course Evaluation Survey
 - Pledge Survey

Assignments Made

- Hubspot Case Reflection (due Thursday, November 7)
- A response to the discussion question for Marketing on Thursday, November 7
- Hubspot Case Report (for bonus participation credit only; due Wednesday, November 20)

Thursday, November 7

Topic

- Midpoint Review and Margaritaville Project Working Session

Objective

- To work on developing action plans for IIP 3 of the Margaritaville project that are seamless and concrete

Readings

- Interdisciplinary Project Project Description

Discussion Question

How should Margaritaville implement your recommendation, and how did you arrive at these implementation choices? IIP 3 asks you to form a well-reasoned answer to this question that spans the four elements of the marketing mix.

Rather than have separate paragraphs or sections for each of the four Ps, the action plan you advance in your IIP 3 Client Report should be *seamless*. As is true for inter-disciplinary curriculum in business schools, the best action plans are integrated. What does this mean practically? You should think of the marketing mix as a framework you can use to create a comprehensive action plan. However, it would be a mistake to let the framework silo your thinking or the structure of your output. Again, you should *not* separate your action plan into four paragraphs or sections, one for each element of the marketing mix. Instead, describe how M'ville should bring your initiative to market by weaving specifications for elements of the marketing mix into a holistic action plan seamlessly.

You might find it helpful to think of yourself and your group members as composers of orchestral music and the four Ps as wind, string, percussion, and brass instruments. Similar to how orchestral writers produce scores that unify these instruments, your task is to produce an action plan that unifies the four Ps. Orchestral writers produce music that a sequence of solos would fall far short of. As a result, symphonies are greater than the sum of their parts. Analogously, you should strive to combine elements of the marketing mix synergistically. As a result, your action plan will be greater than a sum of the four Ps.

The best action plans are also *concrete*. What does this mean practically? You should not leave statements like “we think the line of Margaritaville toasters that we are proposing should enter the market at a high price” undefined. What is a *high* price? In this case, you need to assign dollar values to the individual toasters

that you think should be launched, using cogent reasoning, in order for your action plan to carry weight. No matter the marketing-mix variable, try to bring your recommendations to life by pushing your analysis beyond the abstract. The action plan you develop should unambiguously describe what your initiative would look like in the market and get as close to reality as possible.

Come to class having individually written at least a page of new ideas for your group's action plan. Strive to describe how Margaritaville should implement your recommendation, and how you arrived at these implementation choices, both seamlessly and concretely. In class, your group will be given time to share your ideas with one another, offer constructive feedback, and make progress on your IIP 3 Client Report.

Assignments Due

- A response to today's discussion question

Assignments Made

- None

Wednesday, November 13

Topic

- Midterm Presentations

Objective

- To apply the skills we are developing in Marketing to a real-life situation, such that you end up turning consumer/customer data into significant, actionable, interesting, novel, and broad insights for The Juice Laundry

Readings

- Midterm Project Outline

Discussion Questions

- None

Assignments Due

- Midterm Report
- Midterm Presentation

Assignments Made

- Answers to the discussion questions for Marketing on Thursday, November 14

Thursday, November 14

Topic

- Hard Discounters vs. Online Orders Presentations

Objective

- To debate whether retail disruptors (e.g., Aldi, Lidl) or online orders (e.g., via Instacart, Prime Now, Walmart.com) represent a more significant threat to legacy grocers (e.g., Kroger, HEB) in the United States over the next ten years

Readings

- How Hard Discounters are Disrupting the Traditional Retail Model [Steenkamp and Sloat, 2018]
- How a Cheap, Brutally Efficient Grocery Chain is Upending America's Supermarkets [Meyersohn]
- Walmart Tops US Online Grocery Market, with 62% More Customers Than Next Nearest Rival [Perez]
- Kroger Brings in Robots to Take on Amazon [Halzack]

Discussion Questions

1. What factors weigh most heavily on consumers' grocery shopping habits in the United States?
2. Compare and contrast hard discounters and online orders with legacy grocers. What are the most important ways in which these three classes of trade differ from one another?
3. Based on today's readings, build an argument for or against the following statement:

Compared to online orders (e.g., Instacart, Prime Now, Walmart.com), retail disruptors (e.g., Aldi, Lidl) represent a more significant threat to legacy grocers (e.g., Kroger, HEB) in the United States over the next ten years.

Assignments Due

- Answers to today's discussion questions
- Hard Discounters vs. Online Orders Presentation (for presenting groups only)

Assignments Made

- Answers to the discussion questions for Marketing on Wednesday, November 20
- A group discussion of your analysis of the Starbucks case before Marketing on Wednesday, November 20

Wednesday, November 20

Topic

- Starbucks Case Discussion

Objective

- To gain a better understanding of when and how companies should engage in brand activism
- To strengthen your ability to evaluate alternatives in view of substantive decision criteria

Readings

- Brand Activism at Starbucks – A Tall Order? [Craddock et al., 2018]
- The New CEO Activists [Chatterji and Toffel, 2018]

Discussion Questions

1. What decision needs to be made in the Starbucks case, and what alternatives should Johnson be considering? Arrive at three alternatives, with one being to only engage in brand activism on the topic of race relations in America nonconfrontationally [see Chatterji and Toffel, 2018, p. 82].
2. What guiding principles should Starbucks use to decide among initiatives that it could pursue to improve race relations in America? Define and rank the guiding principles you arrive at cogently.

Assignments Due

- Answers to today's discussion questions
- Hubspot Case Report (for bonus participation credit only)

Assignments Made

- Starbucks Case Reflection (due Thursday, November 21)
- Starbucks Case Report (for bonus participation credit only; due Tuesday, November 26)

Thursday, November 21

Topic

- MarieBette Presentations

Objectives

- To learn more about African American history in Charlottesville
- To explore whether and, if yes, how MarieBette should honor local figures in its 2020 Black History Month Instagram Campaign

Readings

- MarieBette's 2019 Black History Month Instagram Campaign
- Available at <https://www.instagram.com/mariebettecafe> and documented here

Discussion Questions

1. Visit MarieBette on Rose Hill Drive to get first-hand experience as a customer. In class on Thursday, October 10, you will be given a \$10 gift card that you can use to subsidize at least part of your purchase. During or after your visit, reflect on your experience by free writing for 15 minutes.
2. Visit The Jefferson School African American Heritage Center to learn more about African American history in Charlottesville. During or after your visit, reflect on what you learned by free writing for 15 minutes.

Assignments Due

- Starbucks Case Reflection
- Answers to today's discussion questions
- MarieBette Presentation (for presenting groups only)

Assignments Made

- Answers to the discussion questions for Marketing on Tuesday, November 26

Tuesday, November 26

Topic

- Under Armour Case Discussion

Objective

- To prepare for the final exam by working through the 2017 ICE Marketing final exam for Blocks 5 & 6

Readings

- 2016 Fall ICE Marketing Final Exam
- 2017 Fall ICE Marketing Final Exam

Discussion Questions

1. Spend four hours or less writing a case report for the 2017 final exam. What components of your case report came easiest/hardest to you? Was it collecting data that might be relevant to making a decision; identifying and stating one or two high-level concerns, problems, or issues; identifying and evaluating alternatives; or designing an action plan? Take ten minutes to free write about the process you engaged in. (You can keep the case report you generate for your own records.)
2. How could you further hone your decision-making and written communication skills between now and the final exam period to help you reach your full potential? Refer to page 3 of Haywood-Farmer [2008] for ideas.

Assignments Due

- Answers to today's discussion questions
- Starbucks Case Report (for bonus participation credit only)

Assignments Made

- A response to the discussion question for Marketing on Monday, December 2

Monday, December 2

Topic

- Just (B) Presentations

Objective

- To engage in the process of developing a positioning statement and in-depth action plan for a new-to-the-world product

Readings

- Just: Positioned to Target Mainstream Tastes? (B) [Yemen et al., 2018b]

Discussion Questions

1. A positioning statement captures a company's intention for a product by expressing what the company hopes consumers will think of it. Using the following sentence structure, write a positioning statement for the chicken nuggets described in the case. Further, justify the decisions you made for the elements in square brackets.

For [target market], JUST [product name] will be the [differentiating factor(s)] compared to [competitive set] because [supporting evidence].

Assignments Due

- A response to today's discussion question
- JUST (B) Presentation (for presenting groups only)

Assignments Made

- Answers to the discussion questions for Marketing on Tuesday, December 3

Tuesday, December 3

Topic

- 1-800-Flowers.com Case Discussion

Objective

- To prepare for the final exam by working through the 2018 ICE Marketing final exam for Blocks 5 & 6

Readings

- 2018 Fall ICE Marketing Final Exam

Discussion Questions

1. Spend four hours or less writing a case report for the 2018 final exam. What components of your case report came easiest/hardest to you? Was it collecting data that might be relevant to making a decision; identifying and stating one or two high-level concerns, problems, or issues; identifying and evaluating alternatives; or designing an action plan? Take ten minutes to free write about the process you engaged in. (You can keep the case report you generate for your own records.)
2. How could you further hone your decision-making and written communication skills between now and the final exam period to help you reach your full potential? Refer to page 3 of Haywood-Farmer [2008] for ideas.

Assignments Due

- Answers to today's discussion questions

Assignments Made

- None
 - Because you're done! You made it!! Congratulations!!!

Part II

Presentation Outlines

Formula Complete Fitness

The two groups that choose to develop 12-minute presentations for Marketing on Thursday, October 31 will present plans designed to help Formula Complete Fitness reach the male UVA student population more effectively to Ann Dunn (co-owner of Formula).

Formula is a treadmill studio that offers group exercise classes to the Charlottesville community from its location on the corner of Preston Avenue and 10th Street NW. At least four fifths of its clients are female, and Formula is interested in increasing the number of male UVA students that make use of its classes during the school year. Ann and her husband Jason (co-owner of Formula) keep finding themselves pondering the following question:

Is there an identifiable, substantial, and accessible segment [Wedel and Kamakura, 2012] of the male UVA student population that Ann and Jason could engage if only this segment came to know about the classes Formula offers, or does Formula need to offer a new type of class or launch some kind of new initiative to get male UVA students into the studio?

In an effort to help Formula increase its reach, sift through the UVA student population for males who are likely to be susceptible to the group fitness classes that Formula offers or are underserved/dissatisfied in some way that Formula could address profitably with a new type of class or initiative. See Yankelovich and Meer [2006] for tips on how to do so, and be sure to convey how you conducted your survey (that is, explain how you examined and recorded relevant features of the UVA male student population so as to perform a meaningful segmentation). In addition, beyond defining where your group's search led you (i.e., your target market), determine how Formula should position itself to appeal to your target market. These steps will serve as a strong foundation for the plan you present to Ann, regarding how she can reach your chosen target market more effectively.

Both groups should prepare as they would if they were working on a consulting project for Formula in "the real world," with the goal of persuading Ann to implement their plans. Ask for the highest realistic level of commitment you can (e.g., agreement that Formula should implement your plan), and try your best to receive her approval during the up to eight minutes of Q&A that will follow your presentation.

Hard Discounters vs. Online Orders

The two groups that choose to develop 12-minute presentations for Marketing on Thursday, November 14 will be responsible for presenting arguments for or against the following statement:

Compared to online orders (e.g., Instacart, Prime Now, Walmart.com), retail disruptors (e.g., Aldi, Lidl) represent a more significant threat to legacy grocers (e.g., Kroger, HEB) in the United States over the next ten years.

Bruce Montgomery will join us in class for these presentations. Both groups should prepare their arguments as they would if they were presenting at a conference attended by grocers (think Walmart, Kroger, Albertsons, etc.) and food and beverage companies (think PepsiCo, AB inBev, General Mills, etc.) in “the real world,” with the goal of persuading the audience that either hard disruptors or online orders represent a more significant threat to legacy grocers in the United States over the next ten years. Ask for the highest realistic level of commitment that you can (e.g., a majority of the audience’s support for your group’s position in the debate), and try your best to receive the audience’s vote at the conclusion of the presentations. Both group presentations will be followed by up to eight minutes of Q&A.

Generating a thorough understanding of the (a) factors that weigh most heavily on consumers’ grocery shopping habits in the United States and (b) gains and losses that come with shopping at hard discounters and placing online orders versus shopping at legacy grocers should help you begin to develop a convincing argument.

MarieBette

The two groups that choose to develop 12-minute presentations for Marketing on Thursday, November 21 will pitch plans to Jason Becton (co-owner of MarieBette) for MarieBette’s 2020 Black History Month Instagram Campaign. The campaign you develop should feature 29 people (one for each day of February 2020, which is a leap year) from the past or present who have shaped the United States and/or Charlottesville. Build out a Google Sheet like this one to bring your plan to life.

A critical decision that Jason and his husband Patrick (co-owner of MarieBette) are considering relates to how national versus local the people that MarieBette features in 2020 should be. Visit The Jefferson School African American Heritage Center, the Memorial to Enslaved Laborers at UVA, and consult other sources—available on Grounds, online, or via the UVA library—to learn more about the history of race relations both nationally and in Charlottesville. With an in-depth understanding of national and local figures that MarieBette could feature, evaluate the relative merit of campaigns that would have a predominantly national focus, local focus, and equal focus on national and local figures. After arriving at a decision, develop an in-depth campaign plan for MarieBette and establish goals for the campaign. Especially if you believe that your campaign will perform better than the campaign performed in 2019 (see [here](#)), offer cogent reasoning to support your expectation.

Both groups should prepare as they would if they were working on a consulting project for MarieBette in “the real world,” with the goal of persuading Jason to use their campaign plans. Ask for the highest realistic level of commitment you can (e.g., agreement that MarieBette should implement your campaign plan), and try your best to receive his approval during the up to eight minutes of Q&A that will follow your presentation.

JUST

The two groups that choose to develop 12-minute presentations for our class session on Monday, December 2 will be responsible for presenting action plans that offer seamless and concrete answers to the following question:

How should JUST bring the chicken nuggets described in Yemen et al. [2018b] to market?

JUST Co-Founder and CEO Josh Tetrick will video conference into class for these presentations. Both groups should prepare as they would if they were working on a consulting project for Tetrick in “the real world,” with the goal of persuading him to pursue their action plans. Ask for the highest realistic level of commitment you can (e.g., agreement on the most important decisions you land on), and try your best to receive his approval during the up to eight minutes of Q&A that will follow your presentation.

The questions posed in the following paragraphs should help you begin to develop a seamless and concrete recommendation for bringing the chicken nuggets described in Yemen et al. [2018b] to market. The questions all stem from advice given in Quelch [1983], which has stood the test of time and (more than 35 years later) can still help food and beverage companies develop action plans for new products more productively. Thus, reading Quelch [1983] and other related sources—such as those you can access in the archives of HBR—should help you develop your presentation.

- **Product:** Taking market factors into account, define a realistic set of specifications and/or thresholds for nutritional and sensory attributes that JUST’s chicken nuggets need to have. What should JUST name its chicken nuggets? What package size(s) and flavors should JUST offer? How many stockkeeping units should the full portfolio of chicken nuggets have in it? What principles should guide JUST’s package-design decisions for its chicken nuggets? Apply these principles to determine how JUST should design its packaging. What should the packaging look like, and what materials should be used to make it? Are there certain labels or claims that JUST should make sure to include on the packaging?
- **Pricing:** Which pricing strategy should JUST adopt for its chicken nuggets: everyday low price (EDLP) pricing, high-low pricing, or a hybrid of the two? For each stockkeeping unit of chicken nuggets that you believe JUST should bring to market, what should its manufacturer suggested retail price be? What temporary price reductions should JUST offer to “encourage retailers and wholesalers to increase purchase commitments and build inventories” [Quelch, 1983, p. 130]? For what package sizes should they offer these discounts? What pass-through rate should JUST start negotiations at and strive to attain from retailers for the temporary price reductions they offer? When, how often, and for how long should JUST offer temporary price reductions?
- **Promotion:** What advertising and social media activity should JUST invest in to promote its chicken nuggets? What merchandising support (e.g., features in retailers’ weekly circulars, in-store displays) should JUST aim to attain from retailers? In particular, be sure to set targets for the size, location, and timing of features and/or in-store displays. What slogan or message should JUST use to promote its chicken nuggets?
- **Placement:** What retailers and regions of the United States should JUST target for the launch of its chicken nuggets? Should JUST plan to distribute its chicken nuggets intensively or selectively when they first hit the market? How much of JUST’s focus should be on increasing market share in the

retail and food-service sectors, respectively? Where in retail locations should JUST aim to gain initial display space for its chicken nuggets? How many facings should JUST aim to secure in a given grocery store? What restaurant types should JUST target in the food-service sector: fast-food or full-service restaurants?

Part III

Midterm Project Outline

The Juice Laundry

Overview and Objectives

Project Overview

The primary goal of this midterm project is to give you an opportunity to apply the skills you are learning in Marketing to a real-life situation, such that you end up turning consumer/customer data that you collect and will be given into significant, actionable, interesting, novel, and broad insights for The Juice Laundry (TJL), a local Charlottesville business that is partnering with us for the purposes of this midterm project.

The more you engage in the marketing process that this project requires of you, the better you will become at generating, disseminating, and responding to market intelligence [Kohli and Jaworski, 1990]. Improving your ability to perform these three core activities will in turn allow you to help companies—especially those you want to work for—achieve a market orientation and optimize the triple bottom line for profits, people, and the planet [Elkington]. After all, optimizing collective value (i.e., prosperity) is arguably why society engages in commerce and, as a result, marketing in the first place [Donaldson and Walsh, 2015].

Company Overview

As a brief summary, TJL is an organic juice and smoothie bar with five locations, three in Charlottesville, VA, one in Richmond, VA, and one in Washington, DC. Founded by UVA alumni Mike and Sarah Keenan, TJL’s mission is “to inspire healthy, organic, powerful change.” In-store signage articulates Mike and Sarah’s value proposition to customers as follows:

The Juice Laundry was founded on the concept of keeping our bodies clean and healthy, starting with what we put into them. Raw, organic fruits and veggies are nature’s medicine and the foundation of preventative health care. Whether juiced, blended, or eaten whole, fresh produce is full of life-giving nutrients and enzymes. We choose to use 100% organic ingredients, 100% of the time, because the phrase ‘organic whenever possible’ is often highly misleading. If we can’t find something organic on a given day, it won’t be on our menu. That’s our commitment to you, and to your health.

Elsewhere in TJL’s locations, the brand’s slogan “Clean Your Machine” is displayed prominently, as are the brand’s defining principles: “We are Raw. We are Fresh. We are Clean. We are Organic. We are Curious. We are Passionate. We are Transparent. We Leave a Gentle Footprint.” Missing in stores, however, are trash cans, as 100% of TJL’s packaging is either compostable or reusable.

For this midterm, Mike and Sarah are offering us “a lab of sorts” [Newman], somewhere you can talk with them as well as TJL’s employees and customers; analyze data; and, eventually, see the impact of your hard work right in our backyard at the AFC and on the Corner.

Objectives

Your objectives for this midterm project are threefold: (1) identify an area of TJL’s business that is worth looking into; (2) evaluate three alternative directions that TJL could go in in this respect; and (3) develop a comprehensive and convincing action plan that logically flows from what you learn.

Topic Identification

How should you go about identifying an area of TJL’s business that is worth looking into? In line with Colquitt and George [2011], you should strive to identify and address an area of inquiry that:

- **Takes on a grand challenge** (i.e., has a compelling *raison d’être*)
 - By aiming to solve a piece of a larger societal puzzle and, thus, having a compelling purpose (e.g., encouraging healthier eating habits, making commerce more sustainable).
- **Changes the conversation**
 - By exploring the potential of a bold idea that could lead TJL in an unfamiliar, nascent, and radically different direction.
- **Catches and holds Mike and Sarah’s attention**
 - By challenging their taken-for-granted assumptions and solving a mystery you uncover that has multiple plausible endings and cannot be guessed.
- **Casts a wide net**
 - By covering the landscape of your topic adequately and, thus, considering a multitude of outcome variables (including potential unintended consequences), boundary conditions, and explanations.
- **Offers insights for practice**
 - By estimating the potential effect of a new and important practice and conveying findings that Mike and Sarah will be able to act on in the near term.

As is reflected in this document, Mike and Sarah are interested in topics that focus on grand challenges, promise to offer actionable insights, and peak their curiosity. With these priorities in mind, you should be positioned to engage in the marketing process and help TJL further achieve a market orientation.

While developing a list of potential topics to focus on, try to be divergent in your thinking [Peng]. Begin by conducting extensive research on Elevate, Euromonitor, Factiva, Google Trends, Instagram, Mergent Intellect, Yelp, and other platforms. This research, which can also occur in TJL’s and its competitors’ storefronts, will guide you to challenges that TJL is facing [e.g., some consumers think TJL offers low value; Zeithaml, 1988] as well as promising alternatives that TJL could consider implementing to address these challenges (e.g., launching an Instagram campaign focused on educating their followers about the true cost of food).

- **Pro tip:** Be radically open minded—and productively stupid [Schwartz, 2008]—as you search for challenges and strive not to let confirmation bias contaminate your findings [Gallo].
- **Pro tip:** Organize your observations into datasets, such as those discussed in Chapter 12 of R for Data Science so you can summarize them both statistically and visually [Wickham and Grolemund, 2017]. This process will add rigor to your analysis and the insights you generate.

Sort the alternatives you identify into buckets of challenges they address. Then, use the prioritization framework that Colquitt and George [2011] offer to select three buckets (i.e., topics) that you believe are most worth looking into and highlight these topics in a topic choice decision matrix. From here, you will arrive at the topic you believe is most worth doing further research and reporting on for your midterm project.

- **Pro tip:** Explain your topics clearly, so that Mike and Sarah will be able to fully appreciate: (a) the challenges your topics are focused on overcoming and (b) the alternatives your research has led you to consider.

Alternative Evaluation

Focused on the topic you identify, your next objective is to, in a concise and well-balanced manner, explain the three fundamentally different directions that TJL could go in (one of which can be the status quo at TJL). Further, you should arrive at and implement a set of criteria that you believe Mike and Sarah should use to make decisions of this sort.

With alternatives and criteria in hand, you will be able to complete a [value model][johnson-2018] for decision-making purposes [Johnson]. You might find it helpful to structure your value model using this template. Overall, the goal is to evaluate a set of well-balanced alternatives with a ranked set of relevant decision criteria in order to propose a course of action in a convincing manner.

On this point, you should strive to explain your alternatives clearly and define your criteria well so that the scores you assign to alternatives in your value model will seem logical. In other words, try to increase the chances that separate people (namely, your peers, professor, Mike, and Sarah) will more or less agree on the scores you assign to given alternative-criterion pairs and, thus, the logic underlying your strategic recommendation by explaining your alternatives clearly and defining/ranking your criteria cogently.

While analyzing and communicating insights about these and other datasets, the key is to describe the provenance of your data parsimoniously and to define the variables you are analyzing to make decisions clearly, completely, and credibly [Zhang and Shaw, 2012].

Action Plan

Having made your decision, your final objective is to develop an action plan that covers relevant elements of the marketing mix (e.g., product, price, promotion, and place) seamlessly and concretely. Completing this objective well is important because clients need to understand what has to be done (i.e., by who, when, what, where, why, and how?) before they can accept your claims and even begin to consider implementing your recommendations. In order to set expectations, strive to establish goals related to consumers' attitudes, emotions, and/or actions as well as to TJL's triple bottom line [i.e., profits, people, and the planet; Elkington] in specific, measurable, achievable, relevant, and time-bound ways [Miller].

Deliverables

There are two key deliverables for the midterm project, a two-page report and a two-minute presentation.

The Midterm Report

Content

The report is your opportunity to show that you have thought critically, and in a divergent manner [Peng], about TJL's business. What should TJL's top priority be, and why? What makes this topic significant, actionable, and interesting? What alternative approaches should TJL be considering in this area, and how should Mike and Sarah be going about deciding among these alternatives? Ultimately, your report should advocate for some sort of strategic change to TJL's marketing mix in a well-reasoned manner.

More granularly, you should base the action plan you advocate for in your report on the shoulders of (i) a topic with an impressive anatomy [Colquitt and George, 2011]; (ii) a decision-making process with strong principles [Dalio, 2017]; (iii) analysis that is described clearly, completely, and credibly [Zhang and Shaw, 2012]; (iv) a breadth and depth of analyses that are applied accurately, collaboratively, and reproducibly [Parker, 2017]; and (v) stylish writing [Sword, 2012].

Structure

Your report should contain the following sections: (1) Title Page, (2) Main Body (see “Content” above), (3) References, and (4) Tables and Figures. There is no one “right” way to organize the Main Body of your report; however, you should think carefully about what your audience (in this case, Mike and Sarah Keenan) already knows and prioritize discussing original analysis that you have conducted over general statements about TJL’s business.

Length

Should not exceed 1,000 words (not inclusive of your exhibits, end notes, and works cited).

Format

Use 1-inch margins and 12-point serif font throughout. The main body of your report should use 1.5 spacing. Your end notes, exhibits, and figures should all be single spaced. Refer to the Interdisciplinary Project Description for additional details about formatting client-ready business documents.

Assessment

I will use the Case Report Rubric to assess your report, which is worth ten percent of COMM 3020, and to give you developmental feedback.

Submission

Your report is due on Wednesday, November 13 at 9:00 am. Submit your report via BlackBoard, and use the following naming convention for the file you submit: “b#-last-first.pdf” (e.g., “b5-azami-sean.pdf”). If you collect data or conduct analyses to inform your report, you should add this material to your submission via an electronic supplement. Use the same naming convention for this file (e.g., “b#-last-first.xlsx”). Your report and supplements should all make stand-alone sense. Deviating from the simple instructions in this paragraph will earn you a lower grade (–2 out of 100 possible points).

The Midterm Presentation

Content

Prepare a two-minute presentation focused primarily on the action plan in your report and less so on the process that led to it (i.e., topic identification and alternative evaluation). The goal of your presentation is to persuade Mike and Sarah to agree to at least hear more about the action plan you think they should pursue during a (not necessarily hypothetical) follow-up meeting. Ask for the highest realistic level of commitment you can (e.g., a follow-up meeting or a commitment to consider/pursue your recommendation), and do your best to receive Mike and Sarah’s approval. Up to a minute of Q&A will follow your presentation.

Structure

Your presentation should contain the following slides: (1) Title Slide, (2) Main Presentation (see “Content” above), and (3) Appendices. The agenda available [\[here\]](#)^[midterm presentation agenda] will determine when you present. Make sure your final presentation title gets added to the agenda by no later than Wednesday, November 14 at 9:00 am. There is no one “right” way to organize your slide deck; however, you should think

carefully about what your audience (in this case, Mike and Sarah Keenan) already knows and prioritize discussing important details of your recommendation and how your research led you to it over general statements about TJL's business.

Length

Beyond the two-minute limit on your presentation and one-minute limit on your Q&A period, strive to use less than 90 words in your slides and limit your presentation to a total of six slides, including your title slide. Adhering to these additional limits will ensure that you and visual aspects of your slides take center stage.

Format

Use PowerPoint or Keynote for your presentation. Dress is business casual. Honor your peers, and their work, with your full attention during their presentations.

Assessment

After listening to your presentation, Mike, Sarah, your peers, and I will use the following guidelines to assess it and give you developmental feedback. I will convert my assessment to a score out 100 that will contribute up to five percent of your grade for COMM 3020. Internalizing these guidelines is the first step to delivering a presentation that is worthy of an exemplary grade.

- The presenter discussed the data they analyzed in a “simple, easy-to-understand way” [Allen].
- The presenter built a case for the action plan they proposed with well-principled analyses that motivated me to accept their claims.
- The presenter was captivating, edutaining, and eye-catching, a “fusion of scientific rigor with canny attention-grabbing” [Allen].
- The presenter responded to questions and reservations appropriately [see Jolles].
- The presenter's slides were self-explanatory, well referenced, and free of errors.

Submission

Submit your slide deck for your presentation to Blackboard by no later than Wednesday, November 13 at 9:00 am. Use the following naming convention for the file you submit: “b#-last-first.ppt” (e.g., “b5-azami-sean.ppt”).

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