

MKTG 497G: Generating Customer Insights

Spring 2023, 3 credits

Professor: <PROF_FULL_NAME>, PhD

Office: Isenberg N326

Email: <PROF_EMAIL>

Phone: <PHONE> (email is the best way to reach me)

Office Hours: Tue/Thu, 11:30am-12:30pm or by appointment

Class Time: Tue/Thu, 8:30-9:45am (Section 01) & 10:00-11:15am (Section 02)

Dates: February 6 – May 17, 2023

Classroom: SOM G35

Learning Management System: Blackboard Learn (<https://uma.umassonline.net/>)

1) Course Description:

A deep understanding of the customer is essential to developing innovative products, services, and marketing strategies. Qualitative research methods enable firms to study customers and analyze the meaning and importance of their experiences. These methods can uncover in-depth insights about customers' lives and behavior, which are often not accessible through quantitative analyses of big data or conventional marketing metrics. This course introduces students to a set of concepts and research methods for generating, communicating, and leveraging customer insights. Students will learn and practice real-world skills, including culturally-oriented thinking, participant observation, interviewing, focus groups, and netnography (online qualitative research). Throughout the course, students will adopt the perspective of marketing researchers and managers as they learn to develop actionable marketing strategies based on sound thinking and rigorous qualitative research.

2) Course Objectives:

My goal is to help you learn and develop a set of research tools *and* a way of thinking that you can apply in any position and any industry. During the course, you will practice becoming marketing professionals who are curious, aware, empathetic, and responsive toward your customers. The class is structured around the development of three primary capacities:

- **Observing:** Be curious, ask good questions, identify research problems, collect quality data, dig for hidden observations, and expand your awareness of people and the market.
- **Connecting:** Find patterns across observations and understand what those patterns mean.
- **Communicating:** Explain insights clearly and powerfully, and connect explanations to actionable marketing strategies.

Alongside these capacities, students will also develop the following practical skills:

- Think culturally, using your theoretical understanding to identify and explain insights
- Conduct observational and ethnographic fieldwork, including writing detailed fieldnotes
- Conduct focus groups and in-depth consumer interviews
- Conduct online social listening and netnographic research
- Analyze open-ended qualitative data using interpretive coding
- Create customer personas and customer journey maps

3) Readings:

Your individual preparation contributes greatly to the success of everyone in the course. **There is no assigned textbook, but there are readings assigned for each week.** All readings are available on Blackboard in folders labelled by week. **I will also post brief video explanations for each key concept and skill** that will help you understand the readings and apply them to marketing problems. I recommend watching these before completing the readings.

4) Professionalism & Attendance:

Practice the professional behavior that will help you launch a dynamic and successful career. Treat this course as you would treat a job. Come to each class prepared to contribute to the discussion, having read and reflected on the assigned materials beforehand.

The course will follow all current university recommendations for live, in-person learning in Spring 2023. Unless university guidelines necessitate a change, I expect all students to come to scheduled class sessions and participate in-person. Please follow UMass health and safety guidelines and continue to be vigilant about personal and collective health.

If something will prevent you from attending class or arriving on time, email me with as much notice as possible. Provided you advise me of your absence or late arrival ahead of time, you may miss or arrive late for two classes for any reason without affecting your participation grade. Other absences are generally only excused if you provide evidence of an acceptable reason (e.g., doctor's note, Athletic Department verification, religious observance, etc.). More information on university absence policies is available here: <https://www.umass.edu/registrar/students/policies-and-practices/class-absence-policy>.

If you miss a class session, I recommend that you request notes from at least two classmates on the materials covered and announcements given. Use these to create your own set of notes as you review the lecture material and recordings posted on Blackboard.

5) Grading:

I will provide grades and comments on each assignment through Blackboard. Unless otherwise stated, all assignments will be graded within one week of the submission deadline. If you have any questions about my grades or comments, please make an appointment to talk with me during office hours to discuss your assignments in more detail.

See the tables below for a break-down of how grades are calculated for the course:

Course Grading Summary:	
Assignment	Points
Class Participation ▪ Posted in two 50-point parts after each mid-term exam	100
Blackboard Participation ▪ Posted in two 50-point parts after each mid-term exam	100
Exams ▪ Mid-term 1 (80 pts) ▪ Mid-term 2 (80 pts)	160
Research Assignments	340
▪ Field Notes Logs (5 x 20 pts)	▪ 100
▪ Interview Guide	▪ 40
▪ Interview Transcript, Audio File, & Self-Assessment	▪ 100
▪ Interview Data Analysis	▪ 100
Group Project	300
▪ Project Plan	▪ 20
▪ Data & Analysis Report	▪ 70
▪ Persona & Customer Journey Map	▪ 70
▪ Executive Summary	▪ 70
▪ Presentation	▪ 70
Total	1000

Letter Grade Cut-offs:	
A	930-1000
A-	900-929
B+	870-899
B	830-869
B-	800-829
C+	770-799
C	730-769
C-	700-729
D+	670-699
D	600-669
F	<600

6) Class Format and Participation:

This is an interactive, primarily in-person course. In addition to covering key ideas from readings and other material in a lecture format, we will also put these concepts into practice through frequent class exercises and scheduled lab sessions. Come to class prepared to participate meaningfully in discussions and activities by completing all assigned readings and exercises.

There are two types of class sessions: (1) readings discussions and (2) research labs.

- Reading Discussions are typically held on Thursdays. These class sessions involve lecture and discussion that covers the key concepts and issues raised in the assigned readings. Students are expected to complete the readings and review the key concepts before attending the class session. Readings and videos posted on Blackboard will allow you to study and prepare ahead of class. For each discussion, you must review the materials and post a response Blackboard response (see section 7 below).
- Research Labs are typically held on Tuesdays. These sessions will involve in-class data analysis or case study discussions. Specific instructions and materials for each lab will be provided during the class prior to the lab.

Your preparation for and participation in lectures and labs is a key aspect of your learning and your grade. Not only will your preparation help you participate meaningfully in lectures and class exercises, but it also increases your ability to understand and remember the material we are learning and practicing. Based on my daily participation notes, I will assign grades for class participation after each mid-term exam. This allows me to grade holistically and account for student improvement and development over the course of the semester. A grading rubric below provides details about what I look for in class participation.

Class sessions may be recorded and posted for later viewing in the Course Blackboard site, but these recordings are not a substitute for in-class participation. Your voice and name may be included in these recordings as part of your participation. Do not share any portion of these videos outside of class, as that will be FERPA violation.

Rubric for Assessing Student Participation in Class:

Grade	Quantity	Quality	Attentiveness
90-100	Regular contributions to class activities.	Clear, insightful comments that demonstrate preparation, understanding, and creative application of relevant course concepts. Actively engaged and makes meaningful contributions to group and class activities.	Attentive to professor and other students, building constructively on in-class dialogue and discussion forum posts.
80-89	Regular contributions to class activities.	Comments mostly insightful, but may lack specificity or relevance to course concepts and materials. Usually engaged in individual and group activities, but often as a passive observer rather than an active participant.	Mostly attentive to others, but sometimes loses focus or deviates from class discussion.
70-79	Occasional contributions to class activities.	Comments demonstrate only basic understanding of course concepts; often not specific or relevant. Makes relatively few meaningful contributions to class or group activities.	Often inattentive and occasionally disruptive
<70	Infrequent or no contributions to class activities.	Comments not informative or related to course concepts. Unwilling to participate in class or group activities.	Actively disruptive and/or rarely attentive

7) Blackboard Discussion Participation

Before midnight on the day before each reading discussion session, each student will **post a brief written response (roughly 50-100 words) to the weekly Blackboard reading discussion**. This is typically due Tuesdays at 11:59pm. During the course of the semester, you must also post ten (10) replies to other students' discussion posts. All **ten discussion replies must be posted before the due date for second midterm exam**. However, I recommend using this as an opportunity to review and practice using key concepts throughout the semester.

Late policies and penalties apply to all discussion posts. 10% (0.5pts) will be deducted for each day that a post is submitted late, starting a few minutes after the posted deadline.

8 points	Posting an <u>on-time</u> discussion response that: <ul style="list-style-type: none">• Meets the length requirements• Clearly and meaningfully mentions and engages with specific key concepts and ideas from the assigned readings
6-7 points	Posting an <u>on-time</u> discussion response that: <ul style="list-style-type: none">• <u>Meets the length requirements</u>• But... does not engage meaningfully with specific key concepts
1-5 points	Posting a discussion that: <ul style="list-style-type: none">• Does NOT meet the length requirements• Does NOT engage meaningfully with specific key concepts

In addition, **two (2) points will be given for each reply to a classmate's discussion post**. These must be posted before the deadline for the second midterm exam.

8) Research Assignments:

Over the course of the semester, you will collect and analyze real-world customer data. This ongoing research activity enables you to practice and develop a set of insight generation skills as a customer experience researcher. It also provides data that will allow you to answer research questions that address your group's customer insight challenge.

Fieldnotes:

During the semester, you will write fieldnotes about customer situations that you experience or observe in the real world (e.g., retail, food service, recreation, fitness, social gatherings, etc.). **You must submit five fieldnotes during the course of the semester.** Four are due at specified times, and the fifth can be submitted any time before the group data report is due (May 9 before class). You will use your notes to practice analyzing customer experiences in many of our lab sessions, and they will also become data for your group's final project. Instructions are on Blackboard.

Customer Interviews:

You will each plan and conduct an in-depth interview with a customer. This can be done in-person or virtually, using Zoom, Skype, FaceTime or another video call technology. The interview must be recorded to allow you to retain as much data as possible by transcribing it. You cannot interview another undergraduate student or someone who you know more than just in passing (e.g., you should not interview a roommate or a friend or family member). A member of your project group can refer a friend, family member, or other acquaintance for you to contact and interview. You can do the same for another group member. More detailed instructions about the interview assignments will be provided after we cover interview techniques in the class.

Group Research Project:

The culmination of the course will be a group research project. I will form teams based on student interests and experience in an effort to create well-rounded groups. Each project will involve identifying a research problem, proposing specific research questions, collecting and analyzing qualitative data, and creating actionable insights. Projects will be graded in five parts:

1. Group project plan (10 pts)
2. Data collection and analysis report (50 pts)
3. Customer journey map (80 pts)
4. Executive summary (80 pts)
5. Class presentation (80 pts)

Insights gained from your individual assignments will contribute toward this group research project. Your individual research will form the data set your group will draw on to develop customer insights. You must complete individual assignments on your own. However, after submitting these assignments, I encourage you to share and compare insights from individual research with your project group members. During the last third of the semester, the focus of the class will shift to group-level data collection and analysis.

9) Examinations:

Two take-home midterm exams will be administered during the semester (see course schedule). Each midterm will be worth 80 points (8% of your grade) and comprise 10 multiple-choice questions (30 pts), 2 short-answer questions (20 pts), and 1 essay question (30 pts). The multiple-choice questions must be completed in one 60-minute session, but the short answer questions can be started and completed anytime during the week that the exam is open on Blackboard. Exams will be based on key concepts listed in the course outline and discussed in readings and classes.

The university's academic honesty policies and expectations regarding plagiarism and individual work apply equally to take-home exams. These are open-book exams, but you must complete them individually. Blackboard Turnitin automatically checks for plagiarism violations.

10) Late Assignments and Make-up Exams

Assignments turned in after the due date will receive a 10% penalty (one letter grade) for every 24-hour period after the deadline, up to a five-day 50% penalty. Since assignments build off each other, I cannot accept assignments turned in more than five days late without an unexpected and documented excuse.

Make-up exams are only offered for students with an authorized and documented excuse for their absence. Make-up exams must occur on or before the original exam date, unless the student has an unexpected and documented reason that prevents them from doing so.

11) Technology

All students require access to a computer with Microsoft Word and PowerPoint installed to complete course assignments. It is also recommended that you have the capability to participate in Zoom conference calls. These programs are available for Mac and Windows platforms for free through UMass (<https://www.umass.edu/it/software/microsoft-office-365-education>). **All assignments must be submitted in Word, PowerPoint, or PDF format** in order to be graded. Please do NOT submit assignments in Pages, Keynote, or other formats. Students will also need a device that can record audio, video, and photographs (most students can use a smartphone).

12) Empathy and Respect

Each of us has different experiences and perspectives that shape the way we see the world around us. This class and the exercises we will go through only work effectively when we trust each other enough to share our experiences. I expect that we listen and sincerely try to understand other peoples' perspectives without rushing to judgement about them. I also expect that we use our understanding of other peoples' perspectives to share our own thoughts and feelings sensitively. Both will take practice, so I expect that we will be patient with each other. These skills are key to effective interpersonal relationships and customer insights research.

13) Accommodation Statement

The University of Massachusetts Amherst is committed to providing an equal educational opportunity for all students. If you have a documented physical, psychological, or learning disability on file with UMass Disability Services, you may be eligible for reasonable academic accommodations to help you succeed in this course. If you have a documented disability that requires an accommodation, please notify me within the first two weeks of the semester so that we may make appropriate arrangements. If you receive documentation of a disability during the course of the semester, please notify me as soon as possible. With at least one week's notice, I can make proper arrangements and accommodations for upcoming exams or assignments.

If you struggle with particular learning activities or assessment formats in ways that do not fall under the conditions or accommodations approved by Disability Services, please make an

appointment to meet with me and discuss these challenges. Your success is important to me, so if there is a fair and reasonable way for me to support your learning I will always try to do so.

14) Academic Honesty Statement

Since the integrity of the academic enterprise of any institution of higher education requires honesty in scholarship and research, academic honesty is required of all students at the University of Massachusetts Amherst. Academic dishonesty is prohibited in all programs of the University. Academic dishonesty includes but is not limited to: cheating, fabrication, plagiarism, and facilitating dishonesty. Appropriate sanctions may be imposed on any student who has committed an act of academic dishonesty. Instructors should take reasonable steps to address academic misconduct. Any person who has reason to believe that a student has committed academic dishonesty should bring such information to the attention of the appropriate course instructor as soon as possible. Instances of academic dishonesty not related to a specific course should be brought to the attention of the appropriate department Head or Chair. Since students are expected to be familiar with this policy and the commonly accepted standards of academic integrity, ignorance of such standards is not normally sufficient evidence of lack of intent (http://www.umass.edu/dean_students/codeofconduct/acadhonesty/).

15) Health and Emergency Procedures

Taking care of your own health and safety, as well as the health and safety of those around you is extremely important during the public health challenge of COVID-19. Any changes to UMass policies will be followed throughout the semester. Following UMass health and safety guidelines, practice safe interactions with others, including students, faculty, staff, and the public. Keep me posted if health issues prevent you from keeping with coursework. During this time, in particular, I am very understanding of these issues and encourage you to communicate regularly to help each of you keep up with and succeed in the class.

Please be familiar with the classroom and Isenberg building spaces. It is important to note exits and safe routes out of the building in case of an emergency. It is always a good practice to know what you will do in an emergency event (e.g., health emergency, fire, earthquake, active threat). If you have any questions or concerns at all, please reach out to me anytime. Additional information and training materials are also available on the following websites:

- UMass Coronavirus Plans and Announcements: <https://www.umass.edu/coronavirus/>
- UMass COVID-19 Community Agreement: https://www.umass.edu/dean_students/umass-community-agreement
- Center for Counseling and Psychological Health: <https://www.umass.edu/counseling/>
- UMass Office of Emergency Management: <https://www.umass.edu/emergency/>
- UMass Police Department: <https://www.umass.edu/umpd/emergency-preparedness>

16) Syllabus Changes

Adjustments to the syllabus and course schedule may occur as the semester progresses. All syllabus (or any other) changes will be announced in class and/or on Blackboard. It is the student's responsibility to read these announcements and be aware of any changes.

17) Course Schedule:

The course schedule is subject to change. Any changes will be announced in class and/or on Blackboard. Also see the UMass [academic calendar](#) for general university dates and deadlines.

Day	Date	Topics Covered	Assignments Due	Key Concepts
Tue	Feb 7	Introductions and Course Objectives	Read 13 pages: - Syllabus & Course Schedule	<ul style="list-style-type: none"> • Customer Experience • Curiosity • Empathy
Thu	Feb 9	Introduction to Customer Insights Research	Read 10 pages: - <i>The Moment of Clarity</i> (pp. 7-16) by Christian Madsbjerg and Mikkel B. Rasmussen (2014) Blackboard Discussion Post - Due Wed, Feb 8 @ 11:59pm	Key Concepts: <ul style="list-style-type: none"> • Insight • Indicator • Quantitative • Qualitative • Abductive Reasoning
Tue	Feb 14	Lab: Experiencing the Customer's World	Field Notes Log 1 - Post on Blackboard - Due before class today - Bring laptop with field notes	
Thu	Feb 16	Ethnography and Field Observation	Read 14 pages: - <i>The Moment of Clarity</i> (pp. 88-102) by Christian Madsbjerg and Mikkel B. Rasmussen (2014) Blackboard Discussion Post - Due Wed, Feb 15 @ 11:59pm	Key Concepts: <ul style="list-style-type: none"> • Ethnography • Participant Observation • Thick description • "Show, don't tell" • Triangulation • Theoretical Saturation
Tue	Feb 21	Lab: Thick Description Project Groups Assigned	Field Notes Log 2 - Post on Blackboard - Due before class today - Bring laptop with field notes	
Thu	Feb 23	Interviews and Focus Groups	Read 25 pages:	Key Concepts: <ul style="list-style-type: none"> • Grand Tour

			<ul style="list-style-type: none"> - <i>Qualitative Consumer and Marketing Research</i> (Ch. 3) by Russell Belk, Eileen Fischer and Robert Kozinets (2013) <p>Blackboard Discussion Post Due Wed, Feb 22 @ 11:59pm</p>	<ul style="list-style-type: none"> • The Funnel Approach • Probes • Projective Methods • Sampling
Mid-term 1 available on Blackboard: Thursday, Feb 23 – Tuesday, Feb 28 Due Feb 28 @ 11:59pm				
Tue	Feb 28	Lab: In-Class Focus Groups	Field Notes Log 3 w/ focus group question & follow-up prompt(s) <ul style="list-style-type: none"> - Post on Blackboard - Due before class today - Bring laptop with field notes & question 	
Thu	Mar 2	Project Work Day No in-person class!	Submit Group Project Plan on Blackboard <ul style="list-style-type: none"> - One document per group - Follow instructions on Blackboard - Due @ 11:59pm 	
Tue	Mar 7	Asynchronous Lab: Interview Guide Workshop No in-person class!	Prepare Interview Guide <ul style="list-style-type: none"> - Submit to Blackboard discussion before regular class time - Complete 1 peer evaluation and submit by 11:59pm - Submit revised interview guide as Blackboard assignment (due before you complete your interview) 	
Thu	Mar 9	Customer Experience Design	Read (16 pages): <ul style="list-style-type: none"> - “From Touchpoints to Journeys” by McKinsey & Company - “CX Without Design Only Gets You Halfway” by McKinsey & Company Watch (5 mins): <ul style="list-style-type: none"> - “Understanding the Job” by Clayton Christensen Blackboard Discussion Post <ul style="list-style-type: none"> - Due Wed, Mar 8 @ 11:59pm 	Key Concepts: <ul style="list-style-type: none"> • Customer Experience Management • Customer Relationship Management • Persona • Customer Journey • Touch point • Prototype • Jobs-to-be-done
Tue	Mar 14	No Class	Spring Recess	
Thu	Mar 16	No Class	Spring Recess	

Tue	Mar 21	Culture in Marketing & Customer Experience	<p>Read 19 pages:</p> <ul style="list-style-type: none"> - “Culture Needs a Fool-Proof Definition” by Oliver Sweet and Ellie Tait (2019) - “What is Cultural Capital? Do I Have It?” by Nicki Lisa Cole (2019) - “How to Build an Iconic Brand” by Douglas Holt (2003) <p>Blackboard Discussion Post</p> <ul style="list-style-type: none"> - Due Mon, Mar 20 @ 11:59pm 	<p>Key Concepts:</p> <ul style="list-style-type: none"> • Culture • Cultural Capital • Community • Social Class • Cultural Cue • Myth • Ideology • Subculture
Thu	Mar 23	Analyzing Cultural Contexts	<p>Read 18 pages:</p> <ul style="list-style-type: none"> - “Sociological Curiosity” by Jerry A. Jacobs (2021) - “Why Do People Get Tattoos?” by Miliann Kang and Katherine Jones (2007) - “Marketing Manhood in a Post-Feminist Age” by Kristen Barber and Tristan Bridges (2017) <p>Blackboard Discussion Post</p> <p>Due Wed, Mar 22 @ 11:59pm</p>	<p>Key Concepts:</p> <ul style="list-style-type: none"> • Cultural Context • Social Construction • Social Structure • Sociological Imagination • Satire • Hegemony
Tue	Mar 28	Lab: Identifying Consumer Culture	No pre-lab exercises. Just review cultural key concepts, come to class, and participate.	
<p align="center">Interview Assignment due Tuesday, Mar 28 at 11:59pm Submit on Blackboard</p>				
Thu	Mar 30	Netnography and Social Listening	<p>Read 11 pages:</p> <ul style="list-style-type: none"> - “Netnography: The Marketer’s Secret Weapon” by Robert Kozinets (2010) <p>Blackboard Discussion Post</p> <ul style="list-style-type: none"> - Due Wed, Mar 29 @ 11:59pm 	<p>Key Concepts:</p> <ul style="list-style-type: none"> • Netnography • Social Listening • Entrée • Semantics
Tue	Apr 4	Qualitative Data Coding and Analysis	<p>Read 16 pages:</p> <ul style="list-style-type: none"> - <i>Qualitative Consumer and Marketing Research</i> (pp. 138-154) by Russell Belk, Eileen Fischer and Robert Kozinets (2013) <p>Blackboard Discussion Post</p> <p>Due Wed, Apr 5 @ 11:59pm</p>	<p>Key Concepts:</p> <ul style="list-style-type: none"> • Open coding • Axial coding • Emic codes • Etic codes
Thu	Apr 6	Lab: Netnography	<p>Field Notes Log 4 (Netnography)</p> <ul style="list-style-type: none"> - Submit on Blackboard - Due before class today 	

Tue	Apr 11	Lab: Interview Analysis Workshop	Bring laptop to class with interview document accessible	
Thu	Apr 13	Communicating Customer Insights	Watch 13 minutes: - “Business Storytelling Made Easy” by Kelly Parker Blackboard Discussion Post - Due Wed, Apr 12 @ 11:59pm	
Analysis Assignment due Thursday, April 13 at 11:59pm Submit on Blackboard				
Tue	Apr 18	No Class	Patriots Day Holiday Recess	
Thu	Apr 20	Ethics & Social Responsibility of Customer Insights	Read 25 Pages: - “Moving beyond Perceptions: Examining Service Disparities among Consumers” by Sterling Bone et al. (2022) - “Pro-environmental Views of Climate Skeptics” by Kristin Haltinner and Dilshani Sarathchandra (2020) - “Marketing in the Age of Resistance,” by Christine Alemany (2020) Blackboard Discussion Post Due Wed, Apr 24 @ 11:59pm	No key concepts for exam this week
Tue	Apr 25	Lab: Customer Journey Mapping	Bring a laptop with your individual data and analysis files accessible.	
Mid-term 2 available on Blackboard: Thursday, April 27 – Tuesday May 2 Due May 2 @ 11:59pm				
Thu	Apr 27	Project Work Day	No synchronous learning activities scheduled. <u>I am available by appointment during office hours and class time to discuss group projects or any other questions.</u>	
Tue	May 2	Lab: Group Insights and Data Analysis	Come to class with all group member’s data and analysis documents	

Thu	May 4	Project Work Day	<p>No synchronous learning activities scheduled.</p> <p><u>I am available by appointment during office hours and class time to discuss group projects or any other questions.</u></p>	
Tue	May 9	Data & Analysis Presentations to Instructor	<p>1. Data & Analysis Report</p> <ul style="list-style-type: none"> - Submit both files on Blackboard before class today - Meet with instructor during assigned time period - Submit Fieldnotes Log 5 on Blackboard <p>Optional: I also recommend emailing me a draft of your customer journey map to discuss at this time</p>	
Thu	May 11	Project Work Day	<p>No synchronous learning activities scheduled.</p> <p><u>I am available by appointment during office hours and class time to discuss group projects or any other questions.</u></p>	
Tue	May 16	Project Presentations to Instructor and Client	<p>1. Executive Summary</p> <p>2. Presentation PowerPoint</p> <p>3. Persona & Customer Journey Map</p> <p>Submit all files on Blackboard before class today</p>	
No final exam				