Instructor: Dr. L. Swayne, Professor  
Department of Marketing  
Office: Friday Room 240B, UNC Charlotte Campus  
Office Hours: Monday 11:00 am - 12:30 pm campus  
Monday 3:15 - 4:00 pm on campus  
Monday 5:00 - 5:30 pm Center City  
Thursday 5:00 - 5:30 pm Center City  
and by appointment  
Email: leswayne@uncc.edu  
Phone: (704) 687-7602  
Fax: (704) 687-6442  
Home: (704) 919-0756  
Mtns: (828) 756-2280

Course Description: MKTG 3219. Marketing Strategy Consultancy (3). Integration of all marketing elements in a strategic planning framework. Emphasis on areas of strategic importance, especially those which have significant implications and relevance for marketing policy decisions in competitive situations. Students will be involved in addressing a marketing strategy issue with an actual client.

PREREQUISITES: ALL of the following must be met:
- Marketing 3110 (Marketing Concepts) with a grade of “C” or better
- Completion of at least three marketing elective courses (MKTG 32XX courses)
- Senior standing
- Marketing major


Course Objectives: As the capstone course for Marketing majors, the primary goals of this course are to prepare you to think strategically as a marketing professional and to be able to write an effective marketing plan.

Course Methodology: (1) Class discussion of topics, questions, and strategic issues; (2) Oral presentations to faculty and to the actual client; and (3) Development of a Marketing Plan for the client. Teams of 4 to 5 students will compete in the development of an actual marketing plan for a real client with a real issue. As the capstone course, Marketing Strategy Consultancy has been developed to present you with a real-world problem for you to demonstrate your capabilities as a marketing student and your potential as a marketing professional. Working as a team – independently – you will be responsible for developing a marketing plan.

Attendance: Class attendance is expected. However, realistically, there may be an occasion when you are unable to attend class. If you are responsible for presenting information to the class that day, other arrangements can be made if proper advance notice is given to the instructor. Class participation will be used in determining grades. Any student missing more than two classes is subject to an unsatisfactory grade.

It is difficult to participate when not in attendance; lack of participation will be considered lack of preparation. Students will be called on randomly to participate. If you have had an emergency and could not prepare properly for class, you need to inform me prior to class that you do not wish to be called on during that class period.

Assignments: Assignments include submission of several different parts of the Marketing Plan. Each student is responsible for the team’s submission being professional in appearance, grammar, spelling, and punctuation. Students will present various aspects of the plan to the instructor, a team of instructors, and representatives of the client in a competition that is meant to represent the
marketing environment. The top team will be invited to the client’s offices to present their Marketing Plan. No late work is acceptable.

Written Assignments: All written assignments are due on the date assigned and should be typed, double spaced and professional in appearance. Identify all assignments with a cover page that contains the students’ names. For the faculty, staple the paper in the upper left corner; no folders, please. The copy for the client should be submitted with as professional appearance as your team can create. The instructor will keep all work, so if you desire a copy, duplicate the paper before submitting it. Papers with multiple typos or grammatical errors will be returned ungraded, except for the final paper (a penalty of 5 points per error will be assessed). As a group effort, one complete copy of the plan and one copy of the Powerpoint presentation are to be submitted to the instructor. Additional copies will be specified based on the number of clients and faculty participating in the competition. The final project will be presented in randomly assigned flights to the faculty for selection of four teams to present to the "client." All of the written plans will be given to the client. The four selected teams will present to representatives of the client on campus. The two finalist teams will travel to the client’s location for the final presentation and selection of the winning team.

Oral Assignments: Students will have the opportunity to orally present the results of their findings from the various assignments for their Marketing plan. Time limits will be provided and must be adhered to (as is common in marketing presentations).

Exam: The final exam is solely based on the Marketing plan which is developed as group work; however the exam will be independent work as it is used by the Belk College as the assessment of your individual ability to write an effective marketing plan.

Peer Evaluations: All group work will involve peer – as well as self – evaluation of each student’s contribution to the group’s work. Group work is an important part of your learning experience as well as your work as a marketing professional. Each student is expected to report fairly on the work of the members of the group.

Each group should keep “notes” of its meetings that include: day, date, and time of the agreed on meeting, who attended, what was covered, and next assignments. A group may fire a member of the group with documentation of just cause. The fired individual will either have to join another group (if a group is willing to add the person) or do a marketing plan on his/her own. Just cause includes missing group meetings without prior notification, missing group meetings for trivial reasons, failure to deliver work in a timely manner, passively accepting the group’s ideas with little or no input that moves the group toward accomplishing its goals, and not following team rules. The instructor will ask to see your “notes” periodically.

Grading: Situational Analysis – External Environment 100
Situational Analysis – Competitor Environment 100
Situational Analysis – Internal Environment 100
Target Market and Marketing Strategy 100
Marketing Tactics and Timeline 100
Financial Implications and Controls 100
Marketing Plan Presentation 100
Marketing Plan 600
Class Participation 100
Final Exam 600
Total Points 2000
Bonus points (50 round 1, 100 Final Four, 150 final)  
My Points

TOTAL
A = Superior Performance: 1800-2000 points, Total understanding of all material with superior ability to apply knowledge.

B = Good Performance: 1600-1799 points, Excellent understanding and good ability to apply material.

C = Average Performance: 1400-1599 points, Surface understanding of most material and some ability to apply most material.

D = Passing Performance: 1200-1399 points, Incomplete understanding of material with some ability to apply material; lack of participation in class discussions.

F = Failure to Perform: Below 1200, Lack of understanding of material and little ability to apply material. Lack of timely submission, excessive absences, lack of at least satisfactory performance evaluation by the team for group work.

This grading scale is based on total points earned. Grades are given by points only, not by percentage, and because the cut-offs must be drawn somewhere, in the interest of being fair to everyone, I do not round up grades. (For example, a 1078 will be a B grade, not rounded up.) Every point earned counts toward your final grade. Requests for students on the bubble to be awarded an extra point will not be granted. Keep accurate records of your grades to ensure that one point will not make a difference at the end of the term.

ACADEMIC INTEGRITY

The UNC Charlotte Academic Integrity Policy will be followed. The student is responsible for reading and understanding the policy:

Students have the responsibility to know and observe the requirements of The UNC Charlotte Code of Student Academic Integrity. This code forbids cheating, fabrication or falsification of information, multiple submissions of academic work, plagiarism, abuse of academic materials, and complicity in academic dishonesty. Any special requirements or permission regarding academic integrity in this course will be stated by the instructor, and are binding on the students. Academic evaluations in this course include a judgment that the student's work is free from academic dishonesty of any type, and grades in this course therefore should be and will be adversely affected by academic dishonesty. Students who violate the code can be expelled from UNC Charlotte. The normal penalty for a first offense is zero credit on the work involving dishonesty and further substantial reduction of the course grade. In almost all cases the course grade is reduced to F. Copies of the code can be obtained from the Dean of Students Office. Standards of academic integrity will be enforced in this course. Students are expected to report cases of academic dishonesty to the course instructor.

NOTE: Your peer evaluation must be a fair representation of each member’s contribution. It is a violation of academic integrity to decide among the group, or members of the group, as to point allocations. Base your individual evaluation on the contribution of each group member as fairly as possible.

STATEMENT of INCLUSION

The Belk College of Business strives to create an inclusive academic climate in which the dignity of all individuals is respected and maintained. Therefore, we celebrate diversity that includes, but is not limited to ability/disability, age, culture, ethnicity, gender, language, race, religion, sexual orientation, and socio-economic status.

Class Policies

1. If you arrive to class late, you MUST inform the professor before you leave the class that day to be counted as present. If you do not, your tardiness will result in an absence for that date. No exceptions.
2. The use of cell phones, beepers, or other communication devices is disruptive, and is therefore prohibited during class.
3. Students are permitted to use computers ONLY during the lecture portion of class for note-taking. Please make copies of materials you feel that you need to use in any discussion/presentation prior to class.
<table>
<thead>
<tr>
<th>DATE</th>
<th>TOPIC</th>
<th>ASSIGNMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aug 20</td>
<td>Introduction Overview of a Marketing Plan</td>
<td>Student Info Sheets completed</td>
</tr>
<tr>
<td>Aug 27</td>
<td>Project Presentation</td>
<td>Form project teams, outline the project</td>
</tr>
<tr>
<td>Sep 3</td>
<td>Labor Day – No classes</td>
<td></td>
</tr>
<tr>
<td>Sep 10</td>
<td>Team Presentations</td>
<td>Situational Analysis Internal Analysis</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Write-up and slides due (15 minutes)</td>
</tr>
<tr>
<td>Sep 17</td>
<td>Team Meetings</td>
<td></td>
</tr>
<tr>
<td>Sep 24</td>
<td>Team Meetings</td>
<td></td>
</tr>
<tr>
<td>Oct 1</td>
<td>Team Presentations</td>
<td>Situational Analysis External Environment</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Write-up and slides due (15 minutes)</td>
</tr>
<tr>
<td>Oct 8</td>
<td><strong>Fall Break – No classes</strong></td>
<td></td>
</tr>
<tr>
<td>Oct 15</td>
<td>Team Presentations</td>
<td>Situational Analysis Competitive Environment</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Write-up and slides due (15 minutes)</td>
</tr>
<tr>
<td>Oct 22</td>
<td>Team Presentations</td>
<td>Target Market, Goals and Objectives</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Write-up and slides due (15 minutes)</td>
</tr>
<tr>
<td>Oct 29</td>
<td>Team Presentations</td>
<td>Marketing Strategy and Tactics</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Write-up and slides due (15 minutes)</td>
</tr>
<tr>
<td>Nov 5</td>
<td>Team Presentations</td>
<td>Financial Implications and Controls, Timelines</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Write-up and slides due (15 minutes)</td>
</tr>
<tr>
<td>Nov 12</td>
<td>Final Team Practice</td>
<td>Marketing Plan</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Write-up and slides due (30 minutes)</td>
</tr>
<tr>
<td>Nov 19</td>
<td>Flight 1 present to faculty</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Flight 2 present to faculty</td>
<td></td>
</tr>
<tr>
<td>Nov 26</td>
<td>Final Four present to client</td>
<td>Final Marketing Plan and Slides Due for teams not participating in Final Four</td>
</tr>
<tr>
<td>Dec 3</td>
<td>Two teams: Presentation to Client</td>
<td>Final Marketing Plan and Slides Due for all teams not submitted previously</td>
</tr>
<tr>
<td>Dec 10:</td>
<td>11:00 AM – 1:30 PM EXAM: Marketing Plan Key Components</td>
<td></td>
</tr>
</tbody>
</table>
Name____________________________________Preferred to be called__________________________________

Address_____________________________________________________________________________________

Telephone (Home)_____________________ (Work)____________________(cell)_________________

Email ________________________________________________

No. of hours completed:____________ Major 1: ________________________________

Major 2: _____________________________________Minor: __________________________________

Marketing electives completed (grade in Banner):

<table>
<thead>
<tr>
<th>Course Name</th>
<th>Professor</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td></td>
</tr>
</tbody>
</table>

Place of work________________________Hours/week________________________

Career objective______________________________________________________________________________
___________________________________________________________________________________________

What skills do you bring to a team? _____________________________________________________________
___________________________________________________________________________________________

How do you learn best?___________________________________________________________
___________________________________________________________________________________________

I will be graduating in \ May \ December \ Summer 20______(Circle one)

I will return all graded work by December 3, 2012 ____________________________________________

signed