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Strategic Marketing Planning

Course **Strategic Marketing Planning;** Course contents © Stephan Sorger
UC Berkeley Extension EDP XXXXXX; Summer 2010

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Meetings XX/XX/2010 – XX/XX/2010, 6:30-9:30 PM
Some class meetings subject to change
San Francisco Downtown Center, 425 Market St

Course Description

Learn how to develop and write a comprehensive marketing plan. Examine how marketing plans can change with the life cycle or market conditions of a product or service. You develop a model marketing plan that includes an analysis of competition, pricing, promotion, distribution, and building the value proposition. Special emphasis is placed on adopting and maintaining a customer orientation when creating marketing plans.

Course Goals and Learning Objectives

Upon successful completion, participants will:

- Learn the terminology and background required to create a strategic marketing plan
- Study cases of leading firms to focus on key aspects of marketing planning
- Learn by doing through in-class exercises
- Get experience writing a complete marketing plan in a group project environment

Intended Audience

This course is intended for students who are now, or plan to be, working at businesses which conduct marketing planning efforts. Because virtually all companies utilize some form of marketing planning process, it is anticipated that students will find many opportunities to leverage the knowledge learned in this course.

Course Requirements

Prerequisites: Essentials of Marketing or equivalent.

Textbooks

Required: Course Reader:

Stephan Sorger, "Strategic Marketing Planning"

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Grading and Course Components

Grading is calculated from the components shown below, using standard grading cutoff points: 100 – 94 = A, 93 – 90 = A-, 89 – 87 = B+, 86 – 84 = B, 83 – 80 = B-, 79 – 77 = C+, etc.

	<u>Percent</u>
Marketing Plan Team Project	40%
Midterm Exam	30%
Final Exam	<u>30%</u>
Total	100%

Marketing Plan Team Project

All students will participate in project teams, where each team prepares a marketing plan on a product, service, or company of their choice. Each team is responsible for the following deliverables:

- Written report of approximately 20 pages
- In-class 30 minute presentation (or 20 minute presentation, if 4 or more groups present)

On the date of the presentation, students shall submit a hard copy of the written report and the presentation, printed two slides per page, as well as electronic copies on CD (or USB flash drive) of the report and the presentation for the instructor to keep. Each person will receive their overall team's grade, which is calculated according to the attached "Project Grading Sheet".

In-Class Exercises

Each week, students will come to class prepared to do that week's in-class exercise, which is based on a business case, and incorporates hands-on work with a typical marketing plan topic. To prepare for the case, students shall do basic secondary research on the organization that will be covered in the case, so that they are familiar with the organization and their market offering. Often, a video will be shown that highlights aspects of the case or a similar situation. Students then meet in class in their teams to complete the in-class exercise. The exercises reinforce the topics taught during the lecture as applied in a "real-world" environment.

Exams

Exams stress material covered in the reader. The exams are closed-book.

Midterm Exam

The midterm is closed-book, and tests the following chapters in the Reader: 1, 2, 3, 4, 5

Final Exam

The final exam is closed-book, and tests the following chapters in the Reader: 6, 7, 8, 9

Class Participation

Class participation is encouraged. Students must not miss more than 2 class sessions. Students missing classes shall complete that week's in-class exercise to make up the session. Students expecting to miss an exam must make alternate exam arrangements before the scheduled exam date.

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Strategic Marketing Planning UC Berkeley Extension; Fall 2009 Course Schedule

XX/XX/2010: Session 1: Introduction: Marketing Plan Outline

- Administration: Review syllabus; Set up teams; Review project
- Reader: Chapter 1: The Marketing Plan
- Case: Macy's: Development of marketing plan to target bridal market

XX/XX/2010: Session 2: Situation Analysis I: Market Definition and Sizing

- Reader: Chapter 2: Situation Analysis I: Market Description
- Case: Song: Delta Airlines subsidiary to meet airline industry challenges
- Project: DUE: 1 paragraph description of product/ service/ company for marketing plan

XX/XX/2010: Session 3: Situation Analysis II: Company and Competitor Analysis

- Reader: Chapter 3: Situation Analysis II: Company and Competitor Analysis
- Case: Subaru: Quirky brand in a highly competitive market
- Case: Telephia: Example of company specializing in competitive analysis

XX/XX/2010: Session 4: Customer Analysis I: Consumer & Business Markets

- Reader: Chapter 4: Customer Analysis I: Consumer & Business Markets
- Case: Bliss: Day spa catering to consumers
- Case: Eaton: Industrial goods company selling to variety of businesses

XX/XX/2010: Session 5: Customer Analysis II: Segmentation, Targeting, & Positioning

- Reader: Chapter 5: Customer Analysis II: STP
- Case: Marriott: Segmentation of the hotel market
- Case: Nextel: Positioning in the cell phone carrier market

XX/XX/2010: Session 6: Objectives, Market Potential and Forecasting

- Reader: Chapter 6: Market Potential and Forecasting
- Case: Market demand and sales forecasting exercise: Bring laptop
- Midterm Examination: Chapters 1 - 5 in Reader

XX/XX/2010: Session 7: Marketing Strategy I: Product and Price

- Reader: Chapter 7: Marketing Strategy I: Product and Price Strategy
- Case: eGo Bikes: Going green with product strategy
- Case: DSSI and Gulf Power: Price discrimination for electric power

XX/XX/2010: Session 8: Marketing Strategy II: Place and Promotion

- Reader: Chapter 8: Marketing Strategy II: Place and Promotion Strategy
- Case: Hasbro: Distribution channel strategy for games and toys
- Case: Motorola: "Moto" cell phone advertising campaign

XX/XX/2010: Session 9: Finance & Control

- Reader: Chapter 9: Finance and Control
- Case: Dunkin' Donuts: Monitoring growth of a popular franchise
- Final Examination: Chapters 6 - 9 in Reader

XX/XX/2010: Session 10: Presentations

- Project: DUE: Present final group projects
- Project: DUE: Submit final reports

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Project Grading Sheet

Date: _____

Topic: _____

Members: _____

Criteria: Minimum one ppt slide/ written report section for each topic listed below
Grading based on clarity, completeness, and conciseness of every topic
1 point = average work; 2 points = shows outstanding command of subject

No.	Grading Criterion	Report	PPT	Total
Situation Analysis I: Market Description				
1.	Market Definition: Description, Characteristics, Size	1 2	1 2	_____
2.	Market Attractiveness: 5 Force Model: show forces shaping market	1 2	1 2	_____
3.	PEST Analysis: Show how market affected by environment	1 2	1 2	_____
Situation Analysis II: Company & Competitor Analysis				
4.	Company Analysis: Identity, GTM, Value Prop, Share	1 2	1 2	_____
5.	SWOT Analysis: Correlate unique company attributes with market	1 2	1 2	_____
6.	Competitive Analysis: Identification, Comparison, Strategies, P-Map	1 2	1 2	_____
Customer Analysis I: Consumer & Business Markets				
7.	Customer Characteristics: Who, What, Where, When, Why, How	1 2	1 2	_____
8.	Consumer Influences/ Business Buying Roles	1 2	1 2	_____
9.	Consumer Decision Process/ Business Purchase Process	1 2	1 2	_____
Customer Analysis II: Segmentation, Targeting, and Positioning				
10.	Consumer/ Business Market Segmentation: Identifying segments	1 2	1 2	_____
11.	Targeting: Selecting key segments to pursue	1 2	1 2	_____
12.	Positioning: Approach, POD, POP: Understand company & market	1 2	1 2	_____
Objectives, Market Potential, and Forecasting				
13.	Objectives: Show consistency with corporate objectives; SMART	1 2	1 2	_____
14.	Market Potential: Total Available Market, Served Market	1 2	1 2	_____
15.	Sales Forecast: Show approach of predicting future sales	1 2	1 2	_____
Marketing Strategy I: Product & Price				
16.	General Marketing Strategy: Show understanding of strategic options	1 2	1 2	_____
17.	Product/ Service Strategy: Differentiation, Product Mix, Brand	1 2	1 2	_____
18.	Price Strategy: Objectives, Perceived Value, Setting Price	1 2	1 2	_____
Marketing Strategy II: Place & Promotion				
19.	Channels: Channel Selection, Channel Conflict, Partners	1 2	1 2	_____
20.	Promotion: Communications Mix, Media Mix, Internet, Events, PR	1 2	1 2	_____
21.	Sales Promotion: Consumer promotions, Trade promotions	1 2	1 2	_____
Finance & Control				
22.	Finance: Break-even, Profit/Loss: Show understanding of finances	1 2	1 2	_____
23.	Control: Budget, Monitoring plan, Contingency plans	1 2	1 2	_____
Recommendations				
24.	Clarity: Clear, specific, measurable: Easy to communicate to others	1 2	1 2	_____
25.	Actionable: Consistent with situation & resources	1 2	1 2	_____
Total	Total Score: 25 criteria x 4 pts each (2 report + 2 PPT) = 100 points max			_____

Comments: