

Marketing Analytics: Techniques and Technologies

Course **Marketing Analytics: Techniques and Technologies**; aka Marketing Analytics II
Course contents © Stephan Sorger
University of San Francisco MBA 6323

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Meetings Dates: March 30, 2015 – May 11, 2015; 6PM – 9:35PM; San Francisco Downtown

Course Description

This course builds on the knowledge and skills gained in Marketing Analytics I to explore powerful advanced marketing analytics models and metrics. Sample models and metrics include segmentation, regression, competitive analysis, conjoint analysis, decision trees, portfolio resource allocation, distribution channel analytics, and sales analytics and metrics. Participants will learn how to apply the models and metrics using hands-on case studies during class. Together, the models and metrics introduced in this class can have a significant impact on increasing revenue and driving ROI of marketing campaigns.

Course Outcomes

- Be able to apply metrics-driven techniques to improve marketing decisions
- Understand best practices through case studies
- Learn by doing through hands-on computer spreadsheet models and metrics

Prerequisites

- Marketing Analytics I or equivalent, or consent of instructor
- Proficiency with Microsoft Excel

Biography

Stephan Sorger, M.S., M.B.A. is an authority on marketing analytics, practicing it in his role as Vice President of Strategic Marketing at consulting firm On Demand Advisors, teaching courses in marketing analytics since 2008, sitting on analytics-related academic boards, advancing the topic through industry webinars, and defining the topic and approach as author of the new textbook, "Marketing Analytics: Strategic Models and Metrics." In addition to his work in marketing analytics, Stephan is an expert in marketing strategy and planning, and is the author of the Pearson Prentice-Hall textbook, "Marketing Planning: Where Strategy Meets Action."

Office Hours

Students are encouraged to meet during office hours to discuss questions about the course or to obtain general information, such as career advice in the field of marketing analytics. No meetings on holiday weekends.

- Wednesday Evenings: After class in USF Downtown Campus, 101 Howard Street, 5th Floor, San Francisco
- Saturday Afternoons: 12PM-1PM at UC Berkeley Ext. Campus, 160 Spear Street, San Francisco, by appt.

Textbook

Print book version: Sorger, Stephan. "Marketing Analytics: Strategic Models and Metrics." Admiral Press/CreateSpace, 2013. ISBN # 978-1481900300.

Kindle ebook version: Sorger, Stephan. "Marketing Analytics: Strategic Models and Metrics." Admiral Press/CreateSpace, 2013. ASIN # B00BIVMC6U

Resources

- Course Website: Go to StephanSorger.com and click on the "Marketing Analytics" course link to access online materials for the course. Materials include Microsoft PowerPoint-based lecture slides, Excel-based case studies, Internet articles, and videos, all indexed by chapter.
- American Marketing Association: Students are encouraged to join the on-campus AMA chapter to build their network and gain job opportunities. Please contact jmomeara2@usfca.edu to learn more.

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 – 75 = B-, 74 – 65 = C

	<u>Percent</u>
Analytics Project	30%
Midterm Exam:	30%
Final Exam:	30%
Assignments	<u>10%</u>
Total	100%

Analytics Project

Students apply what they learn in class by forming teams and completing an analytics project.

- The model and its data must be non-confidential.
- Students must create their own original work and not re-purpose an existing model.
- Each person will receive their overall team's grade, using the "Project Grading Sheet".

Analytics Project Focus: Project shall involve one of the five situations listed below, based on your organization's need or personal interest:

- Cross-Tab or Regression-based Segmentation (Chapter 3): Identify groups in market
- Competitive Analysis (Chapter 4): Identify and assess competitors in market
- Conjoint Analysis (Chapter 7): Identify top features for new product or service:
- Retailer Selection (Chapter 9): Assess existing distribution channel member or select new one
- Ecommerce Sales Model (Chapter 11): Manage ecommerce sales process

Analytics Project Deliverables: Students will deliver the following elements:

- In-class presentation, covering the areas outlined in the Project Grading Sheet
- PowerPoint hardcopy printout, printed 2 slides per page, for instructor to keep
- Softcopy files for professor, consisting of PowerPoint presentation & Excel spreadsheet on USB flash drive for instructor to keep

Midterm Exam

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

Final Exam

The final exam is closed-book, and tests the following chapters in the textbook: 7, 9, 11

Assignments

Grading: The five areas below are worth one point each, for 5 points per assignment, and 10 points total.

1. **Originality:** Please do not copy the existing assignment Word doc from the website.

Example: Use a new Microsoft Word document or Adobe PDF for the assignment.

2. **Content:** In the document, answer each of the questions. Show your calculations.

Example: "For your question asking to estimate the size of the U.S. laundry detergent market: I calculate it as:
Market Size = (Households) * (Annual Loads/HH) * (Cost/Load) = 114.8M * 400 * \$0.23 = \$10.56B"

3. **Comparison:** Cite a relevant reference to compare your result with that of the industry.

Example Response: "The Wall Street Journal stated that total U.S. sales of laundry detergents decreased from \$7.44 billion to \$7.06 billion, which compares relatively well to the \$8.0 billion estimated."

Source: Ziobro, Paul. "Is Innovation Killing the Soap Business?" Wall Street Journal Online. April 3, 2013.

<http://online.wsj.com/article/SB10001424127887323916304578400521297972496.html>

4. **Commentary:** State your assessment of the company and its situation.

Example: "The U.S. laundry detergent market remains robust, but is facing social, economic, environmental, and other pressures which could affect the long-term value of the market as a whole. Furthermore,..."

5. **Communications:** Email the assignment to the instructor by the specified deadline.

Schedule

March 30, 2015: Meeting 1

- Administration Review syllabus; Introduce class members; Set up teams
- Project Model Development; Sample Project
- Chapter 1 Introduction
- Chapter 4 Competitive Analysis
- Chapter 5A Business Strategy: Strategic Decision Models; Pages 131 – 149
- Video Analytical Hierarchy Process (8:01); Business Scorecard
- Case 1 (Ch. 1) Introduction: Project selection and course preparation
- Assignment 1 Case 5A: QSPM: Hotel industry (Excel); Due on Meeting 3

April 6, 2015: Meeting 2

- Chapter 3A Market Segmentation: Segmentation and Targeting; Pages 52 – 82
- Technology Statistical Analysis Software: SAS, SPSS, and R
- Video Getting Started with R (16:30)
- Case 3A Segmentation: Pets (R)

April 13, 2015: Meeting 3

- Chapter 7A Product and Service Analytics: Conjoint Analysis; Pages 223 - 239
- Video Conjoint in 10 Minutes (9:33)
- Case 7A Conjoint Analysis: Espresso machine industry (Excel and R)
- Project Time during class to work on analytics project

April 20, 2015: Meeting 4

- Chapter 7B Product and Service Analytics: Decision Trees; Portfolio Allocation; Pages 240 - 251
- Video Decision Tree Tutorial (7:00)
- Assignment 2 Case 7B: BCG Resource Allocation: Automotive industry; Due on Meeting 6
- Exam Midterm Examination (Ch. 1, 3A, 4, 5A); Students may leave class when finished

April 27, 2015: Meeting 5

- Chapter 9 Distribution Analytics
- Video Subaru: Automotive dealer surveys (9:30)
- Case 9 (Ch. 9) Distribution Analytics: Cosmetics industry
- Project Time during class to work on analytics project

May 4, 2015: Meeting 6

- Chapter 11 Sales Analytics
- Video Sales Operation Metrics Dashboard
- Case 11 (Ch. 11) Sales Analytics: Online consumer electronic sales industry
- Project Student presentations of analytics projects

May 11, 2015: Meeting 7

- Technology Marketing Automation Overview: Pardot
- Exam Final Examination (Ch. 7, 9, 11); Students may leave class when finished

Marketing Analytics Project Grading Sheet

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Date: _____
 Topic: _____
 Members: _____

No.	Grading Criterion	Score: 1-5	Total
Deliverables			
1.	Time: 15 min. max; Start: _____; End: _____; _____min	1 2 3 4 5	_____
2.	Softcopy of Excel-based model and presentation on CD/DVD/USB flash drive	1 2 3 4 5	_____
3.	Hardcopy of presentation, printed two slides per page	1 2 3 4 5	_____
Microsoft PowerPoint Presentation			
4.	Problem Statement: Described problem clearly & completely; success criteria Comments: _____	1 2 3 4 5	_____
5.	Model Selection: Selected appropriate model type Comments: _____	1 2 3 4 5	_____
6.	Solution Process: Explained step-by-step process; diagrammed model Comments: _____	1 2 3 4 5	_____
7.	Research Method: Showed how data gathered: data sources, relevant data Comments: _____	1 2 3 4 5	_____
8.	Research Analysis: Structured results, interpreted data Comments: _____	1 2 3 4 5	_____
9.	Market Calibration: Model results compared against actual market behavior Comments: _____	1 2 3 4 5	_____
10.	Case Example: Model executed for sample typical case Comments: _____	1 2 3 4 5	_____
11.	Model Results: Results documented, including simulations and "what-if"s Comments: _____	1 2 3 4 5	_____
12.	Results Interpretation: Interprets findings in context of market situation Comments: _____	1 2 3 4 5	_____
13.	Conclusion: Presentation indicates how problem was solved; insights Comments: _____	1 2 3 4 5	_____
14.	Layout: Presentation emphasizes graphs and tables; Limits use of text Comments: _____	1 2 3 4 5	_____
Microsoft Excel Spreadsheet Model			
15.	Demo: Demonstration of model in class goes smoothly, no problems Comments: _____	1 2 3 4 5	_____
16.	Procedure: Spreadsheet describes how to use model Comments: _____	1 2 3 4 5	_____
17.	Inputs: Spreadsheet indicates user input area(s) Comments: _____	1 2 3 4 5	_____
18.	Outputs: Spreadsheet indicates model output area(s) Comments: _____	1 2 3 4 5	_____
19.	Calibration: Spreadsheet indicates calibration procedure, if any Comments: _____	1 2 3 4 5	_____
20.	Structure: Spreadsheet is logically laid out for ease of use Comments: _____	1 2 3 4 5	_____
Total			
Total Score: 20 criteria x 5 pts each = 100 points max		100 max	_____
Comments: _____			