Marketing 455/655 (A1 – Fall 2014)
Sustainability and Responsible Marketing

Course Syllabus

Instructor: Leo Wong, Ph.D.
Time: T/R 9:30-10:50
Location: BUS 4-13
Phone: 780-633-3269
E-mail: leo.wong@ualberta.ca
Website: https://ulearn.ualberta.ca/
Office hours: By appointment only

Calendar Description

Marketing plays a large role in and is affected by corporate social responsibility (CSR) and sustainability issues. This course will explore, examine and inform how the marketing function of business activity engages in CSR and sustainability issues. Specific topics will cover how these issues are influenced by consumer trends and how they are communicated to consumers. Marketing problems found in the non-profit, for-profit and public sectors will be examined, and responsible (and irresponsible) marketing practices will be explored.

Course Description

Marketing plays a large role in and is affected by corporate social responsibility (CSR) and sustainability issues. While some companies have achieved significant social and environmental outcomes and position themselves competitively along sustainability themes, others have struggled to effectively implement and communicate socially responsible and sustainable initiatives.

This course will explore, examine and inform how the marketing function of business activity engages in CSR and sustainability issues. Specific topics will cover how these issues are influenced by consumer trends and how they are communicated to consumers. Marketing problems found in the non-profit, for-profit and public sectors will be examined, and responsible (and irresponsible) marketing practices will be explored. Guest speakers, case studies, class discussions and a real-world group project will help students build knowledge and develop capacity to be a positive social change agent through ethical reasoning in marketing management.

Learning Outcomes:

At the end of this course, you will have developed the following course specific skills or knowledge:

1. To develop an enhanced ability to recognize the marketing dimensions of social, environmental and organizational activity.
2. To be able to understand consumer behaviour in terms of prosocial products and services, and organizations.
3. To be able to explain the impact of consumer forces in the private sector and society in general.

This course is also considered a Community-Service Learning (CSL) course. Students who do their group project with a non-profit client (as opposed to a for-profit client) are eligible to receive CSL credit and pursue a Certificate in CSL. More information about the CSL program can be found at: [http://www.csl.ualberta.ca/](http://www.csl.ualberta.ca/)

This course incorporates the Learning Goals of the BCom (and MBA) Program, in particular… (acronyms are referenced again in the Grading section).

1. Critical Thinking (and Problem Solving)  CT
2. Ethical Awareness  EA
3. Written Communications (Communications Skills)  WC
4. Oral Communication (Communications Skills)  OC
5. Teamwork (and Leadership Skills)  TW
6. Quantitative (and Information Processing) Skills  Q

**Required Text**

ISBN: 978-1-4129-8149-1

*Print version: Available at the U of A Bookstore*

Partial lecture notes will be provided prior to each class on the course website, with additional information provided during class. Some concepts discussed in the text will be emphasized during class, and new concepts not found in the text will be introduced. You are responsible for keeping up with the readings prior to each class.

**Grading**

Final grading in this class is done on the basis of individual student achievement of the course and program outcomes. These outcomes are measured by the following assessments:

<table>
<thead>
<tr>
<th>Assessment Type</th>
<th>Skills</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Class Participation</td>
<td>EA</td>
<td>10%</td>
</tr>
<tr>
<td>Assignments (x2)</td>
<td>WC, OC, TW</td>
<td>20%</td>
</tr>
<tr>
<td>Mid-Term Exam</td>
<td>CT, Q</td>
<td>30%</td>
</tr>
<tr>
<td>Group Project</td>
<td>CT, EA, WC, OC, TW, Q</td>
<td>40%</td>
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<tr>
<td>Overall Course Grade</td>
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<td>100%</td>
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</tbody>
</table>

The University of Alberta uses a letter grading system with a four-point scale of numerical equivalents for calculating grade point averages. Grade points reflect judgments of student achievement made by the instructor. These judgments are based on a combination of absolute achievement and relative performance in a class. Grades will
be awarded according to the method and distributions recommended in the University of Alberta Marking and Grading Guidelines as approved by the General Faculties Council.

**Participation:**

The instructor and the textbook are not the only sources of learning in this class. You and your peers are also a large source of information, and considering this is a marketing class, and all of us are consumers in some way or another, it is critical that you participate during class in discussions.

I will assess your participation level by your willingness to engage during class, in both small and large group discussions. In making my assessment, I’ll be looking for quality and not quantity in terms of discussion.

**Assignments:**

There will be a number of assignments made available during the semester that pertain to specific course material. These assignments are meant to help you explore a recent issue in social responsibility and sustainability as it pertains to marketing. Please refer to the Assignments document on Blackboard for details and due dates.

**Exams:**

There is one mid-term exam and no final exam. The exam will consist of 40 multiple choice and 2 short-answer questions based on lecture materials and the textbook. The mid-term exam is designed to test your understanding and ability to analyze marketing concepts in the context of social responsibility and sustainability issues.

The mid-term exam will cover chapters 1 – 14, and any lecture materials up to the exam date. The exam will be written on Nov 6th.

Marking of exam will be determined as follows:

- Multiple choice (40 x 1.5%) 60%
- Short-Answer (2 x 20%) 40%
- Mid-Term Exam Grade 100%

**Group Project:**

Individual competency in marketing is critical, but so is your ability to work in groups and accomplish tasks as a member of a team. Therefore, you will need to form a group of 4 people. Consider yourselves a marketing consulting firm who has been hired to assist a client with an issue related to social responsibility or sustainability. You may choose from any of the suggested clients posted on the course website, or recruit your own. Each project must be in collaboration with a real-world company or organization. If you find your own client and develop your own project idea, approval from me is required before starting.

**Goal:** To produce a marketing plan and presentation that the client can use to improve their ability to address the issue specified in the project, by implementing tangible actions
that will lead to desired outcomes. Consideration of concepts learned in class, through
guest speakers and in case studies that you feel are most applicable to your client should
be discussed in the plan.

**Selection of clients:** Each group will submit a complete and ordered list of their preferred
clients, and will receive the client highest on their list not already taken. If there is more
than one group with a preferred client at the same preference level, a lottery will
determine the result. The list of preferred clients must be submitted to me by midnight on
**Sept 12th**, and you will be notified of your client by **Sept 16th**.

**Requirements:**
- Initial interview with the client regarding project scope
- Project scope document submitted (CSL Student Agreement is optional)
- REB Student Agreement form (filled out by each student)
- Marketing Plan
  - Between 20 - 25 pages, NOT including appendices
  - Double spaced
  - 11 point font (your choice between Arial or Times New Roman)
  - Margins, header and footer are 1 inch wide
- In-class presentation (up to 20 minutes with 5-10 minute Q&A)
  - It is your responsibility to invite your client to the presentation OR
    schedule a second date to present to your client separately
- Debrief meeting with the client to follow-up on marketing plan feedback

*It is anticipated that each group member will spend at least 25 hours over the
course of the semester on this project, at a minimum.*

**Project Scope:** This document will outline the marketing issue to be addressed, and helps
define boundaries of what will and will not be addressed. Please refer to the Project
Scope template for more information. A Project Scope document must be signed off by
the group members, the client and the instructor before proceeding with the project. The
deadline for returning this document to the instructor (after everyone else has signed off),
is **Sept 25th**.

**Marketing Plan:** A general outline for the marketing plan must include, but is not
limited to *(please come up with catchier section titles than these):*
- Executive Summary
- Situation Analysis
- Target Market Profile
- Marketing Strategy
- Evaluation and Implementation

These sections are a guideline for your report. How you fill in each of these sections is
up to you. Tailoring the report to fit the needs of your client is the priority.

**Executive Summary** should provide a clear and concise description of the
marketing issue, a brief overview of the methods used to address this problem and
the results. Writing this section last may be helpful after the other sections and
the analysis have been completed.
Situation Analysis should detail the industry and its key players such as competitors, suppliers, consumers, partners and regulatory agencies. Using a SWOT analysis may be a helpful approach to take.

Target Market Profile should include a variety of demographics, psychographics and other segmentation methods. A discussion about the target market’s readiness to buy or their state of change can be considered here.

Marketing Strategy should outline the marketing objectives; target market perceived barriers, potential benefits and competing behaviours; a positioning statement and the marketing mix strategies. A discussion of other factors that influence the target consumer should also be addressed such as societal trends, perceived risk, and its’ positioning relative to competitors/alternatives. The general strategies used to address the marketing mix needs to be clearly described and supplemented by a detailed examination of the 4 P’s (product, price, place and promotion). Providing supporting information to justify your decisions is important.

Since this is a major project, supporting information in the form of primary research is expected (ex. interviews, focus groups, surveys, etc.) Careful attention to the research ethics implications must be considered and all appropriate research ethics procedures must be followed.

Other supporting information can be found in academic journals, newspapers, Internet sites, business magazines, trade publications and other external sources. I consider academic journals to be the best source for supporting evidence at a conceptual level, whereas business magazines and other sources provide evidence at a practical level. Some academic journals to consider include Journal of Consumer Research, Journal of Consumer Psychology, Journal of Advertising, Journal of Advertising Research, Psychology and Marketing, Journal of Public Policy and Marketing, etc. If no supporting evidence can be found for your strategies, then it is even more critical that you address the reasons for your statements.

Providing references is also a requirement (and can be included after the conclusion in a Reference section). An example of a reference is shown below:


Evaluation and Implementation This section should address the metrics you will use to evaluate your plan (measures need to be SMART - Specific, Measurable, Achievable, Realistic, and Time-Bound). A complete system of measurements is more likely to have a positive impact. A budget for conducting the marketing plan including the evaluation, and an implementation plan is also suggested.
Outcomes should describe the impact of successful strategies on social, environmental and financial elements of the client. Assuming the measurements were positively fulfilled, what impact would that have on: social factors such as consumer welfare, employee livelihoods, supplier relations, etc.; environmental factors such as pollution, materials reduction, energy efficiency, etc.; and financial factors such as a return on investment (include a financial analysis if necessary).

The final report is due Dec 9th.

**Professionalism** helps make good content even better, and can sometimes disguise bad content. Regardless of the quality of your content, the marketing plan needs to look like it was worth everyone’s time and effort. Therefore, here are some suggestions to make it look nice (but feel free to do more):

- Numbered pages
- Title page
- Labeled appendices (if necessary)
- Charts, graphs and images where appropriate
- Please name your MS Word or PDF file accordingly: First Names Last Names of your group – Project – Title.docx/pdf

In addition, the presentation needs to be delivered with the client in mind and communicated in a manner that is appropriate to ensuring their buy-in.

**Project Peer Reviews** are opportunities for groups to receive feedback during the project from other students. Groups are expected to prepare an informal presentation (~10 minutes long) focusing on a few key issues that they still need to resolve with their projects to solicit input from other students.

**Presentations** will be evaluated on the following characteristics*:

- Overall quality of the content
- Presentation preparedness

The quality and preparedness of your presentation will be equally weighted.

Presentations should aim to be no longer than 20 minutes, with 5-10 minutes afterwards for questions and answers.

**Client Evaluation** will be done by the primary contact from your client organization. He or she will evaluate your group’s project in terms of:

- Effort and time spent on the project
- Relevance and usability of the work performed

Clients will be asked to submit their evaluation of your group’s performance after the final report is submitted, no later than Dec 11th. Keeping in constant contact with your client will help in calibrating expectations, tracking progress and ensuring the project develops according to client needs. This also emphasizes the importance of a well-thought out and agreed upon Project Scope.

**Peer Evaluation** will be done between members of your group. Other group members will evaluate your contribution to the project in terms of*:

- Effort and time spent on the project
Quality of the work done

Effort and quality will be equally weighted and averaged among all evaluations. Evaluations of each group member can be completed via ULearn no later than midnight Dec 11th. Each group member MUST evaluate every other group member. If you neglect to evaluate your group members, you will be penalized 2.5% of your own project grade.

*Evaluations will be judged on a scale of 1 to 5 where 1 = Very Weak, 2 = Somewhat Weak, 3 = Acceptable, 4 = Good, 5 = Excellent.

Group Project Marking:

- Situation Analysis: 10%
- Target Market Profile: 10%
- Marketing Strategy: 35%
- Evaluation and Implementation: 15%
- Professionalism: 5%
- Presentation: 20%
- Peer Evaluation: 5%
- Project Grade: 100%

Debrief Meeting with Client: This meeting is important to put a final wrap on the project. The presentation to the client (whether in-class or done separately) does not mean the project is complete, nor does submitting the final marketing plan to the instructor. The Debrief Meeting must be ‘scheduled’ to take place to collect feedback from the client before Dec 11th. The client will confirm this in their client evaluation form, and if it is not done, a penalty of 2.5% will be taken off from each group member. The meeting can take place after Dec 11th, but must be scheduled by then. The client evaluation will have the potential of up to a +/- 2% bonus/deduction.

Community-Service Learning option: For students working with a non-profit organization, you have the option to receive extra credit (at no cost) in the CSL program. To arrange this is easy, as you only need to check off the option box in the Project Scope document (which doubles as the CSL Student Agreement form). In addition to checking off this box, you may have to complete a Police Information Check (see CSL Guidebook online for when/where).

Academic Integrity:

The University of Alberta is committed to the highest standards of academic integrity and honesty. Students are expected to be familiar with these standards regarding academic honesty and to uphold the policies of the University in this respect. Students are particularly urged to familiarize themselves with the provisions of the Code of Student Behavior (online at http://www.governance.ualberta.ca/CodesofConductandResidenceCommunityStandards/CodeofStudentBehaviour.aspx) and avoid any behavior which could potentially result in suspicions of cheating, plagiarism, misrepresentation of facts and/or participation in an offence. Academic dishonesty is a serious offence and can result in suspension or expulsion from the University. Policy about course outlines can be found in Section 23.4(2) of the University Calendar.
## Class Schedule

<table>
<thead>
<tr>
<th>Date</th>
<th>Class</th>
<th>Notes</th>
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<tbody>
<tr>
<td>Sept 4&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Intro and Ethical Decision-Making</td>
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<tr>
<td>Sept 9&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Chapter 1, 2, 3</td>
<td>UNDERSTANDING</td>
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<td>Defining Social Marketing</td>
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<td></td>
<td>Steps in the Strategic Marketing Process</td>
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<td></td>
<td></td>
<td>Tips to Success</td>
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<tr>
<td>Sept 11&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Meet The Clients</td>
<td>Project pitches from clients to students</td>
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<tr>
<td>Sept 16&lt;sup&gt;th&lt;/sup&gt;</td>
<td>continued from Sept 9&lt;sup&gt;th&lt;/sup&gt; class</td>
<td>Assignments overview</td>
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<tr>
<td>Sept 18&lt;sup&gt;st&lt;/sup&gt;</td>
<td>Chapter 4, 5</td>
<td>ANALYZING</td>
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<td></td>
<td></td>
<td>Determining Research Needs and Options</td>
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<td></td>
<td></td>
<td>Choosing a Purpose and Focus / Situation Analysis</td>
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<tr>
<td></td>
<td></td>
<td>Complete initial client interview</td>
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<tr>
<td>Sept 23&lt;sup&gt;rd&lt;/sup&gt;, 25&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Chapter 6, 7, 8</td>
<td>SELECTING</td>
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<td>Segmenting, Evaluating and Selecting Target Audiences</td>
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<td>Setting Behavior Objectives and Goals</td>
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<td>Identifying Barriers, Benefits, the Competition</td>
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<td></td>
<td></td>
<td>and Influential Others</td>
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<td>Submit Project Scope document by Sept 25&lt;sup&gt;th&lt;/sup&gt;</td>
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<tr>
<td>Sept 30&lt;sup&gt;th&lt;/sup&gt;, Oct 2&lt;sup&gt;nd&lt;/sup&gt;</td>
<td>Chapter 9, 10</td>
<td>DEVELOPING</td>
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<td>Crafting a Desired Positioning</td>
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<td>Product: Creating a Product Platform</td>
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<tr>
<td>Oct 7&lt;sup&gt;th&lt;/sup&gt;, 9&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Chapter 11, 12</td>
<td>Price: Determining Monetary and Nonmonetary Incentives and Disincentives</td>
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<td>Place: Making Access Convenient and Pleasant</td>
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<tr>
<td>Oct 14&lt;sup&gt;th&lt;/sup&gt;, 16&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Chapter 13, 14</td>
<td>Promotion: Deciding on Messages, Messengers, and Creative Strategies</td>
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<td></td>
<td></td>
<td>Promotion: Selecting Communication Channels</td>
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<tr>
<td>Oct 21&lt;sup&gt;st&lt;/sup&gt;</td>
<td>Project Peer Reviews</td>
<td>(up to 4 per day)</td>
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<tr>
<td>Oct 23&lt;sup&gt;rd&lt;/sup&gt;</td>
<td>Project Peer Reviews</td>
<td>(up to 4 per day)</td>
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<tr>
<td>Oct 28&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Project Peer Reviews</td>
<td>(up to 4 per day)</td>
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<td></td>
<td></td>
<td>Assignment 1 due via ULearn</td>
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<tr>
<td>Oct 30&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Special Topic</td>
<td>Consumer Trends and Irrational Behaviour</td>
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<td>Cause-Related Marketing</td>
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<tr>
<td>Nov 4&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Special Topic</td>
<td>Health Marketing</td>
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<td>Negative Option Marketing</td>
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<tr>
<td>Nov 6&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Midterm Exam</td>
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<tr>
<td>Nov 11&lt;sup&gt;th&lt;/sup&gt;</td>
<td>No class – Remembrance Day</td>
<td></td>
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<tr>
<td>Nov 13&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Project Day</td>
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<tr>
<td>Nov 18&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Project Presentations</td>
<td>(up to 3 per day)</td>
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<tr>
<td>Nov 20&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Project Presentations</td>
<td>(up to 3 per day)</td>
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<tr>
<td>Nov 25&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Project Presentations</td>
<td>(up to 3 per day)</td>
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<tr>
<td>Nov 27&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Project Presentations</td>
<td>(up to 3 per day)</td>
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<tr>
<td>Dec 2&lt;sup&gt;nd&lt;/sup&gt;</td>
<td>Wrap-Up</td>
<td>Assignment 2 due via ULearn</td>
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<tr>
<td>Dec 9&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Final Report due via ULearn</td>
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