

UNIVERSITY OF SOUTHERN CALIFORNIA
MARSHALL GRADUATE SCHOOL OF BUSINESS
MKT 533 – BRANDING STRATEGY –
1.5 CREDIT COURSE – FIRST HALF OF SEMESTER
MONDAY/WEDNESDAY 5:00 – 6:20 P.M.
JKP112
FALL 2021

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OFFICE HOURS: Before classes and by appointment

COURSE DESCRIPTION

Some of the most valuable assets managed by organizations today are the brand names associated with their products and services. Strong brands can influence purchase decisions by communicating the value of and providing differentiation compared to its competitors. Effective brand management is critical to maintaining the long-term viability and profitability of products and services. Marketing executives from high profile companies including American Honda Motor Co. Inc., Brandless, Google, Mattel, Mondelez International, and Uber will share the marketing and brand strategies and techniques they employ to increase revenues and profitability and achieve sustainable, competitive advantages.

This course is designed to study brands and brand portfolios in a variety of industries domestically and globally so that key branding principles and frameworks can be applied to develop an effective Brand Strategy Plan (BSP) team project.

COURSE LEARNING OBJECTIVES

Course learning objectives support the three AACSB USC Marshall Graduate Programs Learning Goals to varying degrees. Details may be found in the Appendix of this syllabus as shown on page 14. At the end of this course, students will have acquired the skills and knowledge to effectively:

1. Explain convincingly the value of brands in the lives of customers;
2. Create examples of how to develop effective brand architectures within various types of product portfolios;
3. Detail key aspects of the process of monitoring and strengthening brand equity over time;
4. Propose strategies to most effectively manage domestic and global brand portfolios for the long-term;
5. Define marketing and business problems to identify information that is relevant to the comprehensive analysis of a given business situation and to the development of brand marketing strategies that provide a positive resolution;
6. Identify the key elements of a Brand Strategy Road Map and illustrate how it can be utilized to develop successful branding strategies; and
7. Develop an effective Brand Strategy Plan (BSP) based on customer expectations of identified market segments utilizing all relevant components of an integrated brand strategy marketing program.

COURSE MATERIALS

- Course Reader, which includes all required readings of articles and cases.

ADDITIONAL OR SUPPLEMENTAL READINGS

- Hammond, K. L. (2017), *Branding: Brand Identity, Brand Strategy, and Brand Development*, CreateSpace Independent Publishing Platform.
- Steenkamp, Jan-Benedict (2017). *Global Brand Strategy: World-Wise Marketing in the Age of Branding*, Palgrave Macmillan Limited.

COURSE METHODOLOGY

Learning will be accomplished by employing a combination of assigned readings, exercises, guest speakers, case analyses and a Brand Strategy Plan (BSP). In-class discussions are designed to illustrate real world applications of key branding concepts and frameworks through the use of critical-thinking, analytical, problem-solving and team-building skills. The BSP challenges each team to effectively apply course concepts to the analysis of a brand and the development of a comprehensive set of brand strategy recommendations.

GRADING

The following 1,000-point grading system will be utilized for the MKT 533 – Branding Strategy course:

TOPIC	PERCENTAGE OF GRADE	POINTS	DUE DATE (SEE CLASS SCHEDULE ON PAGE 8)
ORDER OF THE DAY ASSIGNMENTS (5 OF 15 CLASSES)	10%	100	MON., 8/23 – WED., 10/13
CASE WRITE-UP	20%	200	MON., 8/30 – MON., 10/11
MIDTERM EXAM	35%	350	WED., 9/15
TEAM BRAND STRATEGY PLAN (BSP)	35%	350	WED., 10/13
TOTAL	100%	1,000	

A detailed course schedule is shown on page 8. This eight-week 1.5 credit course meets twice a week on Mondays and Wednesdays with each class session lasting for 80 minutes. Final grades represent how you perform in the class relative to other students. Your grade will not be based on a mandated target, but on your performance. Historically, the average grade for a marketing elective class is about a B+/A-. Three items are considered when assigning final grades:

1. Your average weighted score as a percentage of the available points for all assignments (the points you receive divided by the number of points possible).
2. The overall average percentage score within the class.
3. Your ranking among all students in the class.

ATTENDANCE

Students are expected to attend *all* class sessions. Class discussions are an integral part of the learning experience throughout this course. It follows that the frequency and quality of your participation in and contribution to these discussions will have a direct and meaningful relationship to the value as well as the short-term and the long-term benefits you will derive from the course. Late arrival and early departure from any class does not align with the Trojan culture and negatively impacts the in-class learning. Please notify me in advance if you are unable to attend any class.

CLASSROOM POLICIES

Active class participation is important in achieving the learning objectives for this course. Unless students provide an accommodation letter from USC OSAS or from Marshall detailing visa or travel restrictions, attendance and active participation is expected in the classroom.

Any student with such accommodations should submit their accommodation document to their instructor as soon as possible. Your instructor will then provide regular access to a recording of the class and an opportunity to regularly make up missed in-class participation.

Students who are experiencing illness should not attend class in person. Please inform the instructor in advance of the class session to discuss what accommodations will be made to allow for the make-up of missed class work and missed in-class participation. Students will not be penalized for not attending class in person under these circumstances.

TECHNOLOGY REQUIREMENTS

The lecture presentations, links to dossiers, assignments, surveys, and rubrics are located on Blackboard. To participate in learning activities and complete assignments, you will need:

- Access to a working computer that has a current operating system with updates installed, plus speakers or headphones to hear lecture presentations;
- Reliable Internet access and a USC email account;
- A current Internet browser that is compatible with Blackboard (Google Chrome is the recommended browser for Blackboard);
- A working video camera with microphone for use on Zoom;
- Microsoft Word as your word processing program; and
- Reliable data storage for your work, such as a USB drive or Office365 OneDrive cloud storage.

If your computer does not have Microsoft Word, Office 365 package is available to you free of charge and allows you to install Word, Excel, PowerPoint, Outlook, OneNote, Publisher, and Access on up to 5 PCs or Macs and Office apps on other mobile devices including tablets. Office 365 also includes unlimited cloud storage on OneDrive. To download Office 365 log into your student (University) email through a web browser, choose Settings (top right corner), and select software. If you have further questions or need help with the software, please contact the USC ITS service portal.

CLASS CONDUCT/NETIQUETTE

Professionalism will be expected at all times. Because the university classroom is a place designed for the free exchange of ideas, we must show respect for one another in all circumstances. We will show respect for one another by exhibiting patience and courtesy in our exchanges. Appropriate language and restraint from verbal attacks upon those whose perspectives differ from your own is a minimum requirement. Courtesy and kindness are the norm for those who participate in my class.

Our discussion board is a way for you to share your ideas and learning with your colleagues in this class. We do this as colleagues in learning, and the Discussion Board is meant to be a safe and respectful environment for us to conduct these discussions.

Some Netiquette Rules:

- Dress respectfully. Video conference business meetings are and will be the norm, so practice your professional telepresence.
- Virtual background respectfully professional
- Display both your first and last name during video conferencing and synchronous class meetings.
- Respectfully minimize distractions with muting and video off when moving around
- Disagree respectfully
- Respectfully pay attention to classmates
- Do not use all CAPITAL LETTERS in emails or discussion board postings. This is considered "shouting" and is seen as impolite or aggressive.
- Do not use more than one punctuation mark, this is also considered aggressive!!!!
- Begin emails with a professional salutation (Examples: Dr. Name; Ms. Name; Hello Professor Name; Good afternoon Mr. Name). Starting an email without a salutation or a simple "Hey" is not appropriate.
- When sending an email, please include a detailed subject line. Additionally, make sure you reference the course number (Ex. BUAD306) in the message and sign the mail with your name.
- Use proper grammar, spelling, punctuation, and capitalization. Text messaging language is not acceptable. You are practicing for your role as a business leader.
- Re-Read, think, and edit your message before you click "Send/Submit/Post.". as a check, consider whether you would be comfortable with your email, post or text being widely distributed on the Internet.

CLASS PARTICIPATION

Class participation is an extremely important part of the learning experience in this course as the richness of the learning experience will be largely dependent upon the degree of preparation by *all* students prior to each class session.

Additionally, a course that incorporates the frequent use of case analyses to illustrate the practical application of concepts and practices requires the student to diligently and thoroughly prepare cases and actively offer the results of the analyses and conclusions derived as well as recommendations during each class session. It follows that my expectation and that of

CLASS PARTICIPATION (CONTINUED)

your classmates will be that you are prepared for *all* classes and actively participate in and meaningfully contribute to class discussions.

In-class participation is also a critical part of this course's learning experience. Cold calling will take place to encourage active participation and to gain multiple perspectives and points of view, thus lending itself to the richness of the learning experience. While some students are far more comfortable than others with class participation, *all* students should make an effort to contribute meaningfully in *every* class.

Regarding case analyses, students should diligently prepare and share the outcome of their analyses with the class. Students will offer their opinions in group settings many times in their careers; thus, class participation serves to prepare students for this business experience.

As an added benefit to all, participation provides an opportunity to those who lack speaking and presentation skills to develop them in a non-threatening setting and to others it provides a forum to hone their communication and public speaking skills.

ORDER OF THE DAY ASSIGNMENTS

As preparation for class sessions and engagement in better understanding learning outcomes for each class, you are asked to compose one **Question and Answer for 5 of the 15 sessions** of the course related to the learning outcomes of the topics covered during each class session. You are to submit them to a discussion board in Blackboard by 11:59 p.m. on the nights before the next class sessions or on Sunday and Tuesday nights. (See Best Practice examples in the Assignments folder in Blackboard.) These engagement assignments are called Order of the Day and will be used to start class discussions and promote conversations regarding applications of branding strategy concepts, principles, models and terminology to your previous or current work experiences, or from those organizations in the news or that you are interested in joining. They can also be inquiries regarding what you want to learn from guest speakers with the question being asked during the class in which the guest speaker joins the class.

Order of the Day Assignments are worth 10 percent of the grade or 100 of the 1,000 points for the course. A rating of 2, 1 or 0 will be given to each student based on his or her submission. A rating of 2 will be awarded to those students who provide excellent and well thought out questions and answers. A rating of 1 will be awarded to those students who provide an adequate question and answer. A rating of 0 will be awarded to those students who do not submit an Order of the Day or submit an inadequate assignment for any given week. **Late submissions will not be accepted.**

CASE ASSIGNMENTS

Cases are not only vehicles for developing analytical skills and applying concepts and frameworks introduced in readings and lectures, but they also serve as examples of challenges common to real-world settings. Some cases demonstrate successful achievement of strategic objectives while others illustrate failure. We learn as much from failure as we do success.

While case studies that reflect the current business environment frequently provide the best illustration, cases on most topics presented in this or any other course have not been published within the past year or so. As a result, the best and most recent cases available have been selected to maximize the learning outcomes of each case-focused session. Copyright laws often prohibit the sharing of exhibits utilized during case discussions. When this is not the case, I will make the material available by request.

In preparing for cases prior to class, I recommend reading a case more than once. The first reading should give you a sense of the case topic and the type of data contained therein. In subsequent readings, I recommend that you underline or otherwise mark up each case to identify key points relating to the business and situation. You should devote equal attention to case exhibits, which contain information useful for the development of a well-supported analysis.

Facts and research results must be analyzed, noted and subsequently followed by the application of sound logic and reasoning to fully evaluate how the information provided affects the case and influences your conclusions. You are encouraged to reach beyond the data in the case to bring the case to life in a current day context to formulate recommendations that, with the benefit of your additional analysis, will more effectively address or resolve the case issues and provide a more enriched learning experience. As a word of advice, incorporate information you gather regarding actual firm strategies in the cases with caution. Firms make many strategic mistakes and strategies they actually pursue are often inferior to alternative strategies they could have chosen.

CASE ASSIGNMENTS (CONTINUED)

Learning from a case is typically achieved in two steps. The first involves pre-class preparation encompassing the efforts to identify the issues presented in the case, to select and apply the appropriate forms of analysis (e.g., quantitative, logic, experience, conceptual) and, finally, to develop effective, comprehensive solutions and recommendations, all of which you will be expected to complete *before* coming to class. During class discussions, you will be expected to substantiate your conclusions based on your analyses of the assigned case. Marketing strategies should be specific and support overall objectives and recommendations, while incorporating relevant material from class assignments and/or case exhibits.

The second step occurs during in-class discussions when a variety of methodologies applicable to a successful diagnosis, analysis, and solution to business issues--which at times may differ from yours--are examined. I will typically ask students to explain the issues and offer their analysis and recommendations. This method of learning *does not typically provide "the only" answer*. By design, several viable solutions may be developed and supported equally well. Understanding others' positions, learning from them, and countering and/or enhancing them with your own perspectives contribute positively to the learning experience. Only when you have defended your position can you fully understand its strengths and weaknesses. There is rarely a *single* right answer for a case, just as there is rarely a *single* right marketing decision in actual practice.

While it is important to identify a case's purpose in general terms, the most critical outcome is to acquire the ability to develop solid analytical skills, gain an understanding of the applicable marketing principles, evaluate the effectiveness of various alternatives and present solidly grounded recommendations underpinned by strong supporting evidence.

Students are expected to be prepared to actively participate in all case discussions. To encourage deeper insights into case analyses, one case write-up will be assigned to each student between Wednesday, September 1st and Monday, October 11th. The case write-up addressing the case questions found in the Course Reader and on PowerPoint slides along with other grading criteria found on page 9 is worth 20 percent of the grade for a total of 200 out of 1,000 points.

MIDTERM EXAM

The midterm exam will be on Wednesday, September 15th. It will cover key branding strategy topics from sessions 1 – 6. Details on the content and format will be discussed in class. This exam represents 35 percent of the final grade or 350 out of 1,000 points.

BRAND STRATEGY PLAN (BSP) TEAM ASSIGNMENT

In lieu of a final exam and to further apply branding strategy concepts and enhance problem-solving skills, teams of 4 – 5 students are asked to develop an in-depth examination on the new or existing brand of your team's choice in a Brand Strategy Plan (BSP). To aid in the selection of a brand, it is recommended that you find one of the companies that publishes an annual list of the top 100 brands, such as Interbrand. **Please submit in class or by email your team members and brands by Monday, August 30th.** (See pages 10 – 12 for the Brand Strategy Plan (BSP) Framework and grading criteria.) The BSP should address all brand strategy activities that occurred to date in 2021 and earlier, if relevant, and recommend brand strategies for 2022.

I will be happy to discuss any questions you might have before and during the development of the BSP to provide guidance or address any issues you might have regarding your topic and the material required to complete the project.

This assignment is expected to include recommended sections as shown in the BSP Outline on pages 11 – 12. The suggested length of this final BSP assignment is 20 annotated PowerPoint slides with no limit on the number of appendices. The project can be written as an annotated PowerPoint presentation or a Word document. Please include a table of contents and cite referenced information sources in footnotes at the bottom of each page and exhibits in the lower left hand corner of the figure. American Psychological Association (APA) format is preferred.

All are encouraged to take advantage of the wealth of electronic resources we have available through the Gaughan & Tiberti Business Library. If you have any questions or difficulty in gaining access to these resources, please contact Helga Haraldsson, our head librarian, at haraldss@marshall.usc.edu or (213) 740-0050.

The BSP Team Project represents 35 percent of the final grade or 350 out of 1,000 points.

The final BSP project is to be uploaded in the Assignments folder in Blackboard before the beginning of the last class session on October 13th in lieu of a final exam. A penalty of 10 percent per day will be assessed for late submissions. The grade for this assignment may be influenced by each team member's contributions. Please complete the peer evaluation form on page 13 only if there were unequal contributions of team members during the project. Submit the form at the time the assignment is due. Grades for individuals may be impacted based on this assessment.

ACADEMIC INTEGRITY

Students must adhere to the USC Marshall Code of Professionalism and Academic Integrity at all times. Plagiarism is a violation of the Code and will result in a failing grade. The use of unauthorized material, communication with fellow students during an examination, attempts to benefit from the work of another student, and similar behavior that defeats the intent of an examination or other class work is unacceptable to the University. If you have any questions, please contact me for clarification. Where a clear violation has occurred, I may disqualify your work as unacceptable and assign a failing mark on the paper and/or course.

STATEMENT ON ACADEMIC CONDUCT AND SUPPORT SYSTEMS

Academic Conduct:

Students are expected to make themselves aware of and abide by the University community's standards of behavior as articulated in the [Student Conduct Code](#). Plagiarism – presenting someone else's ideas as your own, either verbatim or recast in your own words – is a serious academic offense with serious consequences. Please familiarize yourself with the discussion of plagiarism in *SCampus* in Part B, Section 11, "Behavior Violating University Standards" policy.usc.edu/scampus-part-b. Other forms of academic dishonesty are equally unacceptable. See additional information in *SCampus* and university policies on scientific misconduct at <https://policy.usc.edu/research-and-scholarship-misconduct/>.

Support Systems:

Counseling and Mental Health - (213) 740-9355 – 24/7 on call
studenthealth.usc.edu/counseling

Free and confidential mental health treatment for students, including short-term psychotherapy, group counseling, stress fitness workshops, and crisis intervention.

National Suicide Prevention Lifeline - 1 (800) 273-8255 – 24/7 on call
suicidepreventionlifeline.org

Free and confidential emotional support to people in suicidal crisis or emotional distress 24 hours a day, 7 days a week.

Relationship and Sexual Violence Prevention and Services (RSVP) - (213) 740-9355(WELL), press "0" after hours – 24/7 on call
studenthealth.usc.edu/sexual-assault

Free and confidential therapy services, workshops, and training for situations related to gender-based harm.

Office of Equity and Diversity (OED)- (213) 740-5086 | Title IX – (213) 821-8298
equity.usc.edu, titleix.usc.edu

Information about how to get help or help someone affected by harassment or discrimination, rights of protected classes, reporting options, and additional resources for students, faculty, staff, visitors, and applicants. The university prohibits discrimination or harassment based on the following *protected characteristics*: race, color, national origin, ancestry, religion, sex, gender, gender identity, gender expression, sexual orientation, age, physical disability, medical condition, mental disability, marital status, pregnancy, veteran status, genetic information, and any other characteristic which may be specified in applicable laws and governmental regulations. The university also prohibits sexual assault, non-consensual sexual contact, sexual misconduct, intimate partner violence, stalking, malicious dissuasion, retaliation, and violation of interim measures.

Reporting Incidents of Bias or Harassment - (213) 740-5086 or (213) 821-8298
usc-advocate.symplicity.com/care_report

Avenue to report incidents of bias, hate crimes, and microaggressions to the Office of Equity and Diversity |Title IX for appropriate investigation, supportive measures, and response.

Office of Student Accessibility Services - (213) 740-0776 <https://osas.usc.edu>. [SA\\$frntd@usc.edu](mailto:SA$frntd@usc.edu)
Support and accommodations for students with disabilities. Services include assistance in providing readers/notetakers/interpreters, special accommodations for test taking needs, assistance with architectural barriers, assistive technology, and support for individual needs.

USC Support and Advocacy - (213) 821-4710
ucsa.usc.edu

Assists students and families in resolving complex personal, financial, and academic issues adversely affecting their success as a student.

STATEMENT ON ACADEMIC CONDUCT AND SUPPORT SYSTEMS (CONTINUED)

Diversity at USC - (213) 740-2101

diversity.usc.edu

Information on events, programs and training, the Provost's Diversity and Inclusion Council, Diversity Liaisons for each academic school, chronology, participation, and various resources for students.

USC Emergency - UPC: (213) 740-4321, HSC: (323) 442-1000 – 24/7 on call

dps.usc.edu, emergency.usc.edu

Emergency assistance and avenue to report a crime. Latest updates regarding safety, including ways in which instruction will be continued if an officially declared emergency makes travel to campus infeasible.

USC Department of Public Safety - UPC: (213) 740-6000, HSC: (323) 442-120 – 24/7 on call

dps.usc.edu

Non-emergency assistance or information.

THE IMPORTANCE OF ONLINE COURSE EVALUATIONS

Course evaluations are a valuable source of feedback and taken very seriously. They are administered online during the last week of each course. This course is continuously improved, based on feedback from students and instructor observations.

PROFESSOR/STUDENT INTERACTION

If at any time during the course you have questions regarding the preparation of assignments or other course-related issues, please do not hesitate to contact me by email, telephone or in person to arrange a meeting if desired.

My philosophy is to create a community of learners in which I facilitate discussions guided by the goal of encouraging the construction of knowledge together. I will always give you as much feedback as you desire to help you become better marketers and achieve your personal objectives for this course.

MKT 533 – BRANDING STRATEGY
MONDAYS AND WEDNESDAYS – 5:00 – 6:20 P.M.
1ST HALF OF SEMESTER – FALL 2021
JKP 112
CLASS SCHEDULE

SESSION	DATE	TOPIC	ASSIGNED READINGS AND COURSE REQUIREMENTS	ASSIGNMENTS DUE
1.	MON., 8/23	The Brand Strategy Plan Framework and Brands with a Purpose	<i>Brand Equity: An Overview and Purpose Brands</i> Dove and Real Beauty: Building a Brand with Purpose Case	
2.	WED., 8/25	Brand Strategy Roadmap and Developing Brand Measurement Methods	<i>Brand Measurement Methods</i> Planters Nuts Case	
3.	MON., 8/30	Successful Brand Strategies	Guest Speaker – Kevin Arceneaux, Region Vice President, Mondelez, International	Teams and Brands for Brand Strategic Plan (BSP) Due
4.	WED., 9/1	Managing Brand Architecture and Portfolio Strategy	<i>Brand Portfolio Strategy and Brand Architecture</i> The Marriott-Starwood Merger: Navigating Brand Portfolio Strategy and Brand Architecture	First Case Analysis Due
	MON., 9/6	Labor Day – No Class		
5.	WED., 9/8	Designing Brand Marketing Programs and Strengthening and Sustaining Brand Equity	<i>Understanding Brands and Win the Brand Relevance Battle and Then Build Competitor Barriers</i> Cloud Wars Go Global: How Amazon, Microsoft, Google and Alibaba Compete in Web Services Case	
6.	MON., 9/13	Designing Brand Marketing Programs and Strengthening and Sustaining Brand Equity (Continued)	Guest Speakers – Leo Olebe, Global Director, Games Partnerships, Google	
7.	WED., 9/15	Midterm Exam	Midterm Exam Case – Unilever Canada: Redefining the AXE Brand Case	Midterm Exam
8.	MON., 9/20	Integrating Marketing Communications to Build Brand Equity	<i>Designing an Emotional Strategy: Strengthening Digital Channel Engagements</i> Honda Canada: Relaunching Honda Fit Case	
9.	WED., 9/22	Integrating Marketing Communications to Build Brand Equity (Continued)	Guest Speaker – Ed Beadle, Honda Marketing Department Head – Assistant Vice President at American Honda Motor Company, Inc.	
10.	MON., 9/27	Global Brand Management	<i>Taking a Global View on Brand Post Popularity: Six Social Media Brand Post Practices for Global Markets</i> Uber: Competing Globally Case	
11.	WED., 9/29	Global Brand Management (Continued)	Guest Speaker – Shivram Vaideeswaran, Global Head of Brand at Uber	
12.	MON., 10/4	Private Label Brand Management	<i>How to Brand Your Private Labels</i> Brandless: Disrupting Consumer Packaged Goods Case	
13.	WED., 10/6	Private Label Brand Management (Continued)	Guest Speaker – Tina Sharkey, Co-Founder, Brandless	
14.	MON., 10/11	Reinforcing, Repositioning, and Revitalizing Brand Strategies	<i>The CEO of Levi Strauss on Leading an Iconic Brand Back to Growth</i> Does Mattel’s Iconic Barbie Doll Need a Makeover? Case	Last Case Analysis and Order of the Day Assignments Due
15.	WED., 10/13	Reinforcing, Repositioning, and Revitalizing Brand Strategies (Continued) and Course Summary	Guest Speakers – David Schwartz, Director of Global Marketing, Pixar & Minecraft Action Figures, and Andrew Goodman, Global Franchise Management at Mattel, Inc.	Brand Strategy Plans Due

INDIVIDUAL CASE ASSIGNMENTS

Due on the Date the Case is Discussed in Class – Wednesday, September 1st – Monday, October 11th

Cases have been assigned to apply branding strategies to real world business situations and enhance your analysis, critical thinking and problem-solving skills. Analysis is more than noting that certain facts pertain to one of the central points around which the case is being analyzed. The facts must be noted to support a recommendation, but then reasoning must be applied to determine how and in what way these facts affect the points in the case.

Information regarding the branding strategies selected by the firms in the cases should be incorporated with caution. Firms make strategic mistakes when ineffective strategies are executed that are inferior to alternative strategies that they could have chosen.

Individual Case Write-up Assignment

You will be assigned to prepare a case analysis write-up on one of the following five cases that will be covered between Wednesday, September 1st and Monday, October 11th:

- The Marriott-Starwood Merger: Navigating Brand Portfolio Strategy and Brand Architecture – Due 9/1
- Cloud Wars Go Global: How Amazon, Microsoft, Google and Alibaba compete in Web Services – Due 9/8
- Honda Canada: Relaunching Honda Fit – Due 9/20
- Uber: Competing Globally – Due 9/27
- Brandless: Disrupting Consumer Packaged Goods – Due 10/4
- Does Mattel’s Iconic Barbie Doll Need a Makeover? – Due 10/11

A guideline for the length of the paper is 5 – 7 single-spaced pages, excluding exhibits. The case write-up will be 20 percent of the grade for a total of 20 out of 1,000 points. The case is to be uploaded in Blackboard in the Assignments folder under Individual Case Assignment before the beginning of the class in which the case is discussed. Late papers will not be accepted.

Guidelines for Effective Case Analyses

Case write-ups *should incorporate the readings* on the topic area in which the case is assigned and focus on *marketing strategy issues*.

You are also highly encouraged to expand your analysis beyond these questions to issues that you think should be addressed to more effectively analyze the case. Using information outside of the case is encouraged because it brings a real perspective to the case.

The following are general guidelines for preparing an effective case analysis:

- Please address the case discussion questions in your case write-up.
- Clearly identify upfront all of the major issues identified in the case.
- Provide a coherent, well-organized analysis, not just a regurgitation of facts presented in the case.
- Be concise. Provide a strong, logical flow throughout your paper. Do not spend time rehashing or paraphrasing the details of the case.
- The supporting analysis should be thorough, carried out correctly and consistently, and should draw, whenever relevant, on material presented in class or assigned in readings.
- Recommendations should be specific, cost-effective, and appropriate to the timing (short-term or long-term) of the problem at hand and supported with case data and exhibits where relevant.
- Be sure to add risks to recommendations and suggested ways to mitigate them.
- Complete the assignment by including all of the grading criteria in the case write-up.

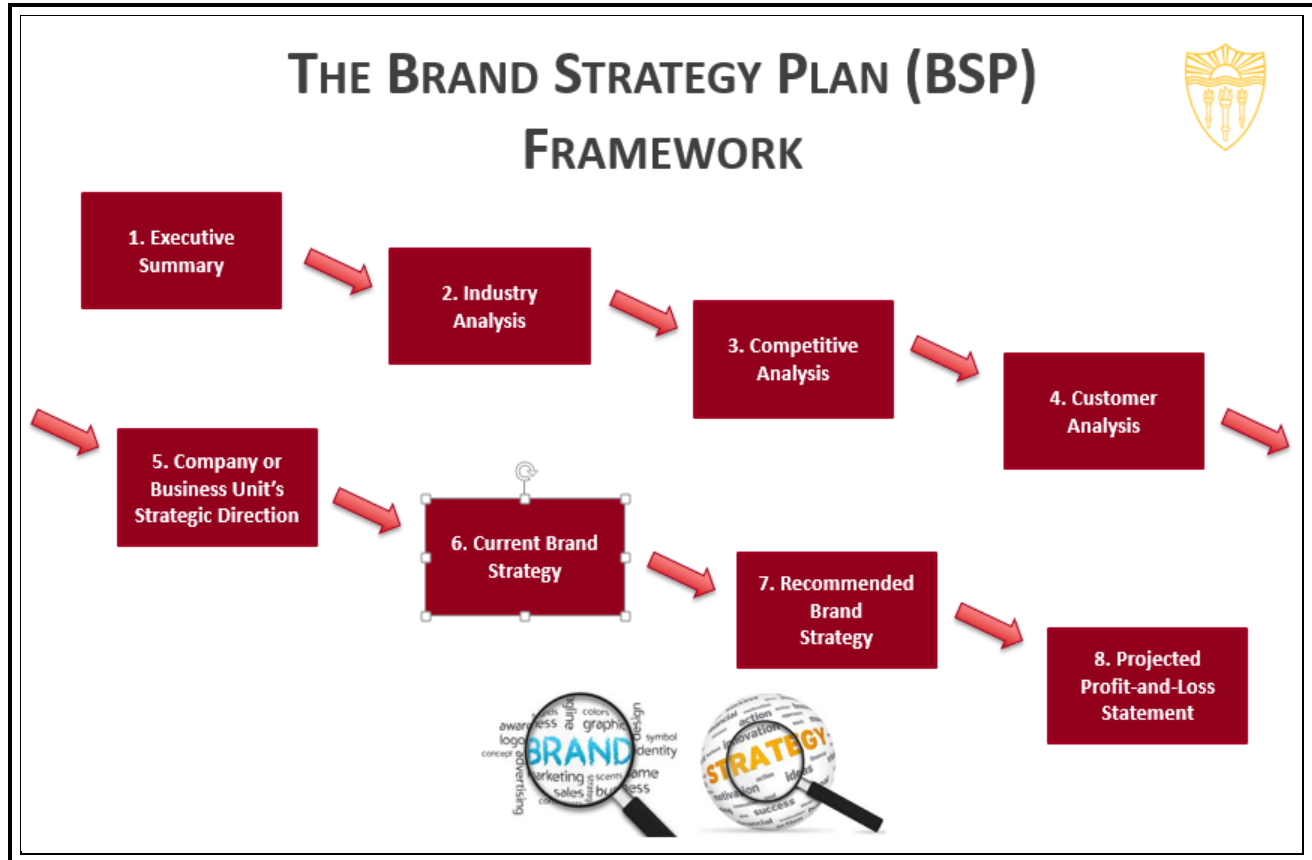
Grading

The following criteria will be utilized to grade the case analyses:

1. Statement of the relevant issues presented in the case
2. Quality of addressing case questions
3. Quality and support of recommendations
4. Risks associated with recommendations and how to mitigate the risks
5. Case summary that highlights key marketing principles as reflected in the learning outcomes for each case and how they were applied to the case.

A FRAMEWORK FOR BRAND STRATEGY PLAN (BSP) FORMULATION

The Brand Strategy Plan (BSP) Framework below will be utilized for case and in-class discussions throughout the course and for the Brand Strategy Plan (BSP) team project.



The project is to be uploaded in Blackboard before the beginning of the last class session on Wednesday, October 13th. Grading criteria for the Brand Strategy Plan (BSP) team project will include the following:

1. Executive Summary
2. Industry Analysis
3. Competitive Analysis
4. Customer Analysis
5. Company or Business Unit's Strategic Direction
6. Current Brand Strategy
7. Recommended Brand Strategy
8. Projected Profit-and-Loss Statements

BRAND STRATEGY PLAN (BSP) FRAMEWORK

- 1. EXECUTIVE SUMMARY** – A brief synopsis (preferably one page) of the Brand Strategy Plan (BSP) that provides highlights of the target markets, objectives, strategies, and financial expectations.
- 2. INDUSTRY ANALYSIS** – An assessment of the size and attractiveness of the market or category in which the brand competes.
 - A. Define the industry or category the brand is in
 - B. Show industry or category size in revenues, growth over the past 3 years and projected growth over the next 3 years
 - C. Technological issues
 - D. Legal/regulatory issues
- 3. COMPETITIVE ANALYSIS** – An analysis of the competitive landscape.
 - A. Most current market shares and recent trends
 - B. Salient brand attributes or descriptors
 - C. Perceived perceptions, positioning, projected changes, advertising and promotion, strengths and weaknesses of major competitors
 - D. Implied positioning and brand imagery, including a multi-dimensional perceptual map
- 4. CUSTOMER ANALYSIS** – An analysis that also recommends ways to maximize the company’s strengths and opportunities and mitigate weaknesses and threats regarding the company and marketing the new or existing product or service.
 - A. Target market category and brand specific
 - B. Target wants and needs relative to the category
 - C. Audience size and segmentation
- 5. COMPANY OR BUSINESS UNIT’S STRATEGIC DIRECTION** – Relevant background data on the company, business model, alliances, strategic initiatives and its core competencies and personality.
 - A. Company/Business Unit growth objectives
 - B. Business model – direct to consumer, B2B, etc.
 - C. Key alliances/co-branding partners
 - D. Strategic initiatives and implications for brand
 - E. Core competencies and personality
- 6. CURRENT BRAND STRATEGY** – An assessment of the current brand image, brand strategy, brand building and brand growth strategies.
 - A. Brand Image and Strategy**
 - What the brand is known for
 - Perceived brand image, perceived quality and brand personality
 - Brand’s heritage
 - Brand elements associated with the brand, such as trademarks, logos, taglines and/or sub-brands
 - Brand attributes/customer associations
 - Points of parity/points of difference versus the competition
 - Brand awareness level
 - Profile of the brand’s brand-building activities
 - Current positioning – taglines, brand visuals/symbols, current advertising and promotional campaigns
 - B. Brand Building Assessment**
 - Amount of brand resonance
 - Key marketing activities that have most contributed to the success of achieving its resonance and positioning
 - C. Brand Growth Assessment**
 - Critique of the brand’s architecture
 - Strengths and weaknesses about the brand architecture
 - Fit of brand into a broader brand portfolio
 - Degree to which the brand has expanded into new markets or channels
 - Assessment of current growth strategy

BRAND STRATEGY PLAN (BSP) FRAMEWORK (CONTINUED)

7. **RECOMMENDED BRAND STRATEGY** – Proposed elements in the brand strategy that will enhance the brand image and equity.
 - A. Vision – End in mind achievement.
 - B. Purpose – Reason for existence.
 - C. Big idea – Idea that is worth loving to include the brand personality, consumer views, products and services and internal beacon.
 - D. Five sources of connectivity – Elements that help connect the brand with customers and drive brand love.
 - a. Promise
 - b. Strategy
 - c. Story
 - d. Freshness
 - e. Experience
 - E. Values – Guideposts to ensure that the behavior of everyone in the organization is set to deliver upon the brand's promise.
 - F. Goals – Annual milestones to push and challenge everyone in the organization.
 - G. Strategies – Essential choices made on how to get to the vision.
 - H. Tactics – Activities and executions required to accomplish the strategies.

8. **PROJECTED PROFIT-AND-LOSS STATEMENTS** – Forecasted P&L statements with summary and assumptions based on recommended brand strategies and tactics.
 - A. Most likely P&L statement for 2022 and at least until breakeven is achieved
 - B. Best case scenario
 - C. Worst case scenario

BRAND STRATEGY PLAN PEER EVALUATION FORM

Please complete the following Brand Strategy Plan peer evaluation form **only if you feel as though there was unequal participation in the team project.**

Identify your team and team members for the Brand Strategy Plan Project that you worked on. Then rate all of your team members, *including yourself*, based on the contributions of each team member for the selected assignment according to the criteria listed below. On a scale of 0 – 2 with 0 equal to does not meet expectations, 1 meets expectations and 2 exceeds expectations, rate each person on each of the five criteria. Lastly, add up the points for each person with the maximum number of points for each person being 10.

Team:				
Your Name:				
Team Members/ Assessment Criteria of Team Contributions	Team Member 1	Team Member 2	Team Member 3	Team Member 4 – Yourself
1. Role Performance				
2. Assists Team Members				
3. Listening and Discussing				
4. Research and Information Sharing				
5. Time Management				
Total				

If you desire, please comment on the contributions of individual team members to the team Brand Strategy Plan Project.

Comments:

**APPENDIX – CONTRIBUTION OF MKT 533 – BRANDING STRATEGY TO STUDENT ACHIEVEMENT OF
USC MARSHALL’S AACSB SIX GRADUATE PROGRAM LEARNING GOALS**

MKT 533 – BRANDING STRATEGY LEARNING OBJECTIVES 1-7

1. Explain convincingly the value of brands in the lives of customers;
2. Create examples of how to develop effective brand architectures within various types of product portfolios;
3. Detail key aspects of the process of monitoring and strengthening brand equity over time;
4. Propose strategies to most effectively manage domestic and global brand portfolios for the long-term;
5. Define marketing and business problems to identify information that is relevant to the comprehensive analysis of a given business situation and to the development of a brand marketing strategy that provides a positive resolution;
6. Identify the key elements of a Brand Strategy Road Map and illustrate how it can be utilized to develop successful branding strategies; and
7. Develop an effective Brand Strategy Plan (BSP) based on customer expectations of identified market segments utilizing all relevant components of an integrated brand strategy marketing program.

MARSHALL GRADUATE PROGRAMS LEARNING GOALS	MKT 533 OBJECTIVES THAT SUPPORT THIS GOAL
<i>Learning Goal #1: Develop Personal Strengths.</i> Our graduates will develop a global and entrepreneurial mindset, lead with integrity, purpose and ethical perspective, and draw value from diversity and inclusion.	Supported by MKT 533 Learning Objectives 1-7
1.1 Possess personal integrity and a commitment to an organization’s purpose and core values.	n/a
1.2 Expand awareness with a global and entrepreneurial mindset, drawing value from diversity and inclusion.	1-7
1.3 Exhibit awareness of ethical dimensions and professional standards in decision making.	1-7
<i>Learning Goal #2: Gain Knowledge and Skills.</i> Our graduates will develop a deep understanding of the key functions of business enterprises and will be able to identify and take advantage of opportunities in a complex, uncertain and dynamic business environment using critical and analytical thinking skills.	Supported by MKT 533 Learning Objectives 1-7
2.1 Gain knowledge of the key functions of business enterprises.	1-7
2.2 Acquire advanced skills to understand and analyze significant business opportunities, which can be complex, uncertain and dynamic.	1-7
2.3 Use critical and analytical thinking to identify viable options that can create short-term and long-term value for organizations and their stakeholders.	1-7
<i>Learning Goal #3: Motivate and Build High Performing Teams.</i> Our graduates will achieve results by fostering collaboration, communication and adaptability on individual, team, and organization levels.	Supported by MKT 533 Learning Objectives 1-7
3.1 Motivate and work with colleagues, partners, and other stakeholders to achieve organizational purposes.	1-7
3.2 Help build and sustain high-performing teams by infusing teams with a variety of perspectives, talents, and skills and aligning individual success with team success and with overall organizational success.	1-7
3.3 Foster collaboration, communication and adaptability in helping organizations excel in a changing business landscape.	1-7