MKTG 315-01 Principles of Category Management

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TEXT


Non-Disclosure Agreement: In order to participate in this class and use the POS Scanner and Household Panel databases, you are required to sign a non-disclosure agreement (NDA). Although data are aggregated and thus not household identifiable, Xavier University is committed to protect the intellectual property of Nielsen, Inc. The university maintains the master legal agreement with them. We are leveraging Nielsen Answers for our class.

SUPPORTING ACADEMIC AND OVERALL HONESTY
The work you do is assumed to be your own. Please review the university guidelines regarding academic honesty.

CLASS COMMUNICATION
I will use the announcements function in Canvas for most communications in this class. Please make sure that you are checking Canvas regularly. All PowerPoints will be posted on Canvas. Please reference the correct PowerPoints according to the syllabus.

OFFICE HOURS
Tuesdays/Thursdays: 1:00PM – 2:15PM. Note these are my “official” Office Hours for all Grad and Undergrad Students. I’m on campus most days of the week. Please just call me at my office or on my cell phone if you’d like to make an appointment. If you run into a problem, please don’t wait – I’m here for you and I want you to succeed!

MY “STYLE”
There are a number of ways for us to work together. I’m not a fan of lecturing for hours on end and not including you in the experience. Please know that I’m a strong supporter of a very interactive, Socratic teaching style. It’s really important for you to come to class prepared and provide your point of view on relevant subject matter. You will learn a lot from each other as well.

I’m a strong supporter of the Ignatian pedagogical paradigm and committed to working with you
as you experience our class. As such we get our hands dirty together and deliver work that makes a difference.

TEACHING STYLE AND PHILOSOPHY
Please come to class prepared! You are integral part of how we all learn together. I prefer to “coach” and guide our class discussions vs. straight lectures. It is really important that you participate in these discussions and challenge the points made in our class when applicable.

COURSE OBJECTIVES
1. To understand Category Management as a discipline that maximizes the partnership between a retailer and manufacturer. Understanding how a manufacturer’s products align with a retailer’s shoppers is a prerequisite to success. Throughout the course you will be exposed to numerous consumer and shopper insights metrics and how they’re used in the sales and marketing processes. You will also use a large online consumer panel to help reinforce classroom instruction and provide for consumer understanding in launching a new product.

2. While the structure of the course is around the industry accepted 8 Step Category Management model, shopper behavior is stressed throughout the class and is the focus – all decisions we make should start with the shopper.

3. To integrate into class discussions issues that are relevant to the mission of the Williams College of Business (WCB). The mission of the WCB is: We educate students of business, enabling them to improve organizations and society, consistent with the Jesuit tradition. In particular you will see a personal commitment towards “cura personalis” – the education of the whole person.

Characteristics of the Ignatian vision are:
- “See life and the whole universe as a gift calling forth wonder and gratefulness.”
- “Gives ample scope imagination and emotion as well as intellect.”
- “Seeks to find the divine in all things --- in all peoples and cultures, in all areas of study and learning, in every human response…”
- “Cultivates critical awareness of personal and social evil, but points to God’s love as more powerful than any evil.”

LEARNING GOALS – WILLIAMS COLLEGE OF BUSINESS: UNDERGRADUATE PROGRAM
- **Critical Thinking**
  *Learning Goal:* WCB graduates will be able to think logically, reason quantitatively, and utilize appropriate analytical techniques and technology when evaluating and making decisions.
  *Corresponding Objectives:*
  - (1) WCB students will collect, evaluate and synthesize information to offer solutions and support decision making.

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*Taken from “Do You Speak Ignatian,” by George Traub, S.J., Ph.D., Xavier University*
• (2) WCB students will evaluate and articulate implications of business decisions and their impact on organizational stakeholders, both individually and in teams.

• **Ethics and Social Responsibility**  
  *Learning Goal*: WCB graduates will be able to recognize ethical issues, discern moral implications of decision making, and be prepared, and willing, to serve as responsible and professional members of society.  
  *Corresponding Objectives*:  
  • (1) WCB students will recognize ethical issues and their implications on personal and business decisions.  
  • (2) WCB students will demonstrate the skills necessary to analyze information and make informed, ethical decisions in complex, conflicting or ambiguous environments or situations.

• **Effective Written and Oral Communication**  
  *Learning Goal*: WCB graduates will be able to organize, support and communicate ideas clearly and effectively, employ multiple mediums of communication (e.g., written, oral and visual), and adapt communication to audience, context or purpose.  
  *Corresponding Objectives*:  
  • (1) WCB students will produce business documents and reports demonstrating their ability to organize and communicate ideas clearly and professionally.  
  • (2) WCB students will make effective presentations, accompanied by the appropriate technology, demonstrating their ability to organize and communicate ideas clearly and professionally, both individually and in teams.

• **Global Perspective and Cultural Diversity**  
  *Learning Goal*: WCB graduates will appreciate the historical and cultural contexts of the world in which they live, demonstrate the competencies required for engaging in global business activities, and respect and value diverse peoples and perspectives.  
  *Corresponding Objectives*:  
  • (1) WCB students will identify and contrast key attributes of countries’ business environments.  
  • (2) WCB students will evaluate and integrate global economic, political, technological, environmental and societal issues into their decision making.  
  • (3) WCB students will integrate the concepts of respect, inclusiveness and valuing all persons into their decision making.

• **Understanding and Application of Knowledge Across Business Disciplines**  
  *Learning Goal*: WCB graduates will be able to evaluate business from an integrative and holistic point of view, leverage the synergies between functional business areas, and demonstrate college-level mastery of their chosen discipline.  
  *Corresponding Objectives*:  
  • (1) WCB students will demonstrate the appropriate knowledge of accounting, economics, finance, management, management information systems, marketing, quantitative business analytics, international issues, and the legal and social environment of business.
• (2) WCB students will evaluate business problems from an integrative point of view, including diverse business functions, competition and external environment (social, political, economic, and environmental.)
• (3) WCB students will demonstrate college-level mastery of the body of knowledge and skills relative to their major. (To be determined at the departmental level.)
• **Personal and Professional Development**
  *Learning Goal:* WCB graduates will be well-prepared for their future careers and appreciate the importance of continuous professional development and life-long learning.
  *Corresponding Objective:*
  • WCB students will articulate career goals, prepare a professional resume, demonstrate behavior-based interviewing techniques and develop a professional network.

**GRADING CRITERIA**

Grades are weighted by the following:
- **Written** Team Category Management Project – 25%
  - Note: a significant portion of your grade will be dependent on peer feedback based on your commitment to building the team project.
- **Oral** Team Presentation of Category Management Project on Final Exam Day – 10%
- Mid Term Exam – 30% - do not wait until the last minute to study for this 😊
- Participation (attendance, “pop” and scheduled quizzes, retailer presentations, and active discussion) – 10%
- Quiz #1 – 10%
- Quiz #2 – 15%

**Quizzes, Midterm and Final Exams**
Quiz/Exam material will be taken from the text for the course, topical areas discussed on the PowerPoint slides, class lecture, handouts, readings, and any other material discussed during classes leading up to the exam.

Your book has many resources that can help you be successful in this course. Use it!

**GRADE LEVELS**
Final grades will be calculated as follows:

<table>
<thead>
<tr>
<th>Grade</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>A</td>
<td>93 – 100.0%</td>
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<tr>
<td>A-</td>
<td>90 – 92.9%</td>
</tr>
<tr>
<td>B+</td>
<td>87 – 89.9%</td>
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<tr>
<td>B</td>
<td>83 – 86.9%</td>
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<tr>
<td>B-</td>
<td>80 – 82.9%</td>
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<tr>
<td>C+</td>
<td>77 – 79.9%</td>
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<tr>
<td>C</td>
<td>73 – 76.9%</td>
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<tr>
<td>C-</td>
<td>70 – 72.9%</td>
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<tr>
<td>D</td>
<td>60 – 69.9%</td>
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<td>F</td>
<td>Below 60%</td>
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I reserve the right to calibrate grading based on observed demonstrated effort including attendance. Also a 360 peer review will be provided by your project teammates and can influence your grade. **Please do NOT ask me to “round up” for your grades as the grading bands are generous.** For example, an 89.7 is a B+. Help me to protect the integrity of our
grading guidelines and the value of your Xavier Education and your own personal brand as a Graduate. Grading is at the SOLE discretion of the Instructor.

Please be aware that your Final Grade in Canvas should be interpreted as directional. I manually calculate each score using the weights outlined in the Grading Criteria. Canvas is imprecise in the Final Score calculation and also doesn’t incorporate Peer Feedback and other metrics.

ATTENDANCE & PARTICIPATION
It is critical that you attend classes on a regular basis. We appreciate the commitment of time and resources that you have made to attend our program at Xavier University.

The class consists of a series of lectures, group projects, and guest speakers in the appropriate industry – YOU WILL MISS A LOT if you miss a class. You learn the most from interacting with others.

Beginning with the 6th absence, your participation grade will be lowered by 1 point. Attendance is a significant part of your participation grade.

EXAM/QUIZ MAKEUP POLICY
Exams and Quizzes are scheduled in advance. However I know things come up occasionally. Alternative opportunities must be completed within 2 class days. Please just talk with me, ok?

DATABASES:
In order to develop Insights and Action Plans, you must perform research on your category, customers, and megatrends that may impact your category’s performance. While you can do some of this through Nielsen Answers, you’ll need to leverage other different data sources to uncover meaningful facts. Here are some great applications that you can use from the Xavier Library that will help you complete your category story:

- **ABI/Inform**: provides information on advertising, economics, human resources, finance, marketing, computers and more
- **AdForum**: Allows you to review media including commercials
- **Euromonitor**: Great Category/Brand information including share, trends, and analysis
- **University Reporter (MediaMark Reporter)**: enables you to review demographic and media consumption information
- **Qualtrics (qualtrics.xavier.edu)**: while not a database, this is an awesome tool to capture Primary Research.

SCHEDULE OF EVENTS for Mktg 315-01, Fall 2017

PLANNED COURSE CALENDAR (*)

August 22/24, 2017: Review of the syllabus, understanding our group baseline, beginning to understand the Category Management model, Team Formation.
- Read Chapter 1: Why Category Management?
August 29/31, 2017: Understanding Scanner-based metrics, Nielsen, IRI.
  • Read Chapter 3: Strategy

  • Read Chapter 4.0: Business Process
  • Training on Nielsen Answers system

September 12/14, 2017: Completion of Scanner and Panel Metrics – prepare for Quiz #1

September 19, 2017: Nielsen Answers Training – please bring your laptop

September 21, 2017: Quiz #1

September 26/28 2017: The Eight Steps of Category Management
  • Focus on Defining the Category, Assigning Category Roles
  • Read Chapters 4.1-4.4, 5.3

October 3, 2017: The Eight Steps of Category Management (cont’d)
  • Category Assessment,
  • Read Chapters 4.5-4.9, 5.1

October 5, 2017: Fall Holiday – No Class

October 10, 2017: Category Scorecarding

October 12, 2017: Midterm Exam

October 17, 2017: “The Eight Steps of Category Management”: Marketing Strategy,

October 19, 2017: Finishing “The Eight Steps of Category Management”: Category Tactics

October 24, 2017: MadTree Brewery Lecture and Tour: Understanding the role of the Brewer – Details TBA
  • Read Chapter 5.2 for next class

October 26, 2017: Lecture: Segmentation.

October 31, 2017: Careers in Category Management: Guest Speaker from Kroger Co.
  • Guest Speakers from Kroger will present. Meet your Kroger Category Manager to learn about their category goals. Category Assignment Overview
  • Read Chapters 5.4, 6
November 2, 2017: Careers in Category Management: Guest Speaker from a major Beer Manufacturer or Wine/Spirits Producer

November 7, 2017: Lecture: The Use of Digital Media to engage shoppers and grow categories – Guest Speaker TBA

November 9/14, 2017: Lecture: Focus on the Consumer and Leveraging Consumer Insights/Group Project Work Using Shopper Insights to deepen the partnership with Retailers

November 16, 2017: Lecture: Comparing and Contrasting Category Management models/Group Project Work

November 21, 2017: Group Project Work – Xavier University is OPEN

November 23, 2017: Thanksgiving Holiday – Xavier University is CLOSED

November 28/30, 2017: Continued Evolution in Category Management

December 5, 2017: Quiz #2

December 7, 2017: Group Project Work

December 14, 2017 – 8:30-10:20pm: Category Management Oral Presentation, Written Category Management Assignments and project peer feedback reports are due by 11:59pm on December 14th. Full Team Participation. THESE CLASSES ARE MANDATORY

(*) Please note that class times for Guest Speakers are dependent on their schedules.