Marketing Strategy Teaching Collaboration

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Many business schools offer courses of a similar theme in both their undergraduate and graduate programs. Being common for recent graduates of a school to matriculate into a graduate program of the same school, there is a need to ensure that undergraduate and graduate courses that share a similar theme complement one another. Yet content and assignment overlap must be minimized while providing greater rigor at the graduate level. Using the experiences of faculty from one university's approach to address this situation, this paper a) explicates the philosophy behind the creation of Marketing Strategy courses at both the undergraduate and graduate levels and b) describes the process of developing/redeveloping and differentiating the courses.

Keywords: marketing strategy, marketing collaboration, strategic marketing

INTRODUCTION AND BACKGROUND

It is not uncommon for a person to return to their undergraduate alma mater to earn his or her graduate degree. In our university, we are seeing more students go straight from undergraduate into our MBA program. While this trend may bode well for schools experiencing this phenomenon and can be interpreted as a stamp of satisfaction with one's undergraduate education, it can pose several challenges for business schools. First, schools must ensure that similarly themed courses at each level are distinct so that students do not feel like they have taken the same course twice. This challenge can be especially acute at smaller schools where it may be the same faculty member delivering both courses. Second, the graduate course must build on – and not conflict with – the undergraduate course content while providing graduate-level academic rigor.

Our university faced such challenges when the school of business decided to create a "capstone" marketing strategy course for undergraduate majors. The school had run a Marketing Strategy course in its MBA program for many years, so the addition of the undergraduate course required a concerted effort to meet certain goals of the administration. Those goals included: avoiding excessive duplication of content, ensuring consistency in the approach to developing and implementing marketing strategy, and providing two distinct courses despite both serving a similar role in bringing together core themes of marketing through the lens of strategy.

REVIEW OF LITERATURE

In business education, and marketing education in particular, one continues to see advancements, innovations, and new strategies for teaching marketing content, skills, and applied theory (Francesucci & Rohani, 2018). Many of these advancements and educational improvements are related to growth in online teaching, distance education, digital technological engagement (new simulations), and innovation that is designed to help students understand marketing principles and content in dynamic ways that relate to an ever-changing marketplace and customer base (Chen & Benedicktus, 2018; Crittenden & Peterson, 2019). As marketing education (including the explanation, unpacking, and teaching of marketing strategy and strategic decision making in marketing) is changing and improving in dynamic ways, students continue to desire to understand and be able to apply dynamic marketing methods to real-world scenarios and occupational opportunities for professional flourishing (Elbeck, 2018).

One of the main ways marketing principles, content, and learning is being applied strategically and intentionally is with continued technological advances related to simulations, artificial intelligence, virtual reality, big data collection and synthesis, as well as deeper insights into studying and understanding customer data, habits, and preferences (Davenport, Guha, Grewal, & Bressgott, 2019; Moreira, 2021; Rust, 2020). These technological advances in the classroom and in marketing educational delivery is fueled by continuous "digital disruptions" that require marketing and business faculty to not only continue to update and enhance their teaching and delivery methods, but also their curriculum and program designs to intentionally keep up with an ever-changing global world of marketing and customer engagement (Crittenden & Peterson, 2019).

When these technological advances and digital improvements in marketing education are present in the classroom, computer lab, office, conference room, seminar meeting, lecture hall, etc., students then are better prepared for strategic marketing intelligence, decision making, and critical thinking that is so needed and exponentially helpful in the various functions of domestic and international business (Crittenden, Biel, & Lovely, 2019). Considering these technological, digital transformation, and new content, curriculum, and programmatic evolutions, this paper puts forward one helpful pathway for a tech-forward and collaborative effort for teaching "Marketing Strategy" or "Strategic Marketing" courses (both on the undergraduate and graduate levels) seeking both maximum effectiveness and real-time learning (Bacon & Stewart, 2021).

Marketing Strategy Overview

Strategic thinking, planning, decision-making, and execution is critical to successful marketing in all business contexts (both domestic and international), and the strategic focus of "how do we compete" drives at the heart of engaging customers' hearts and minds in unique and memorable ways compared to other competition (Morgan, Whitler, Feng, & Chari, 2018). Strategic marketing also involves a litany of cultural contexts, people-group preferences, historical relevance, and specific details and frameworks native to certain geographic areas all around the world; thus marketing strategy teaching and communication must have the ability to communicate consistent principles and guiding practices within flexible delivery and execution realities given the need for consistent education that can be adapted amongst businesses worldwide (Song, Moon, Chen, & Houston, 2018). In addition, marketing strategies can vary across international business lines given the different barriers to entry for companies and firms seeking marketing engagement based on governmental policies, political influences, and allowances (Katsikeas, Leonidou, & Zeriti, 2019). Thus, strategic marketing management, planning, decision making, and execution must be both purposeful and flexible, and marketing faculty must have the ability to be able to teach crucial strategic marketing methods and principles while understanding the management of these methods and principles will vary across a variety of business contexts worldwide (Rutz & Watson, 2019).

Marketing Strategy - The Customer

Strategic marketing decisions and effective marketing execution is only as effective and worthwhile as the customers that are not only engaged, but moved mentally and emotionally from casual customers to consistent and avid customers (in actual spending, product and service engagement, as well as repeat

business engager) (Varadarajan, 2020). Marketing literature has often shown that customers must be engaged on macro and micro levels with strategic marketing methods that stand out from the competition in memorable ways; and from an educational standpoint, students need to be able to understand (through effective coursework) how to effectively move customers through the entire buying and decision-making process within the frameworks of business goals and functions (Zarzosa, 2022). As students learn to think about marketing strategy and marketing principles as an entire toolbox that leads to effective customer engagement and retainment, they become (within the contexts of a classroom, internships, simulations, etc.) better prepared for entry level jobs in marketing that allow critical thinking and decision making with the customer (their needs, wants, desires, emotions, willingness to spend, etc.) in mind (Dahl, Peltier, & Schibrowsky, 2018). Thus, marketing principles and concepts in general, and strategic marketing training in particular need to help students and professionals (both international and domestic) be able to understand a customer so well that marketing can be personalized, sustainable, and targeted towards specific people groups in order to maximize both effectiveness and the resources invested for growing customer relationships (Deo, Hinchcliff, Gibbons, Thai, Papakosmas, Chad, & Heffernan, 2023; Ipek, 2020; Tong, Luo, & Xu, 2020).

Marketing Education

In marketing education, literature suggests that effective marketing communication and learning in classrooms should be well-informed in current marketing practices, intellectually engaging for students (both in learning and practice), and help students not only project what they are learning onto future careers, but also lead to reflection on how marketing has been successful historically in marketplaces (international and domestic) and why (Crittenden, 2023). As higher education costs increase, educational options and technological methods of delivery grow, and marketing classrooms vary in emphases and focus, it is crucial for strategic marketing education to be valuable not only for the student's knowledge, but also for shaping one's ability to communicate with constituents and cast effective strategic vision and worth (Bacon, Stewart, Paul, & Hartley, 2023). Effective marketing communication learned in the classroom can take many shapes and helpful formations that engage customers in a variety of ways, and the best current marketing teaching practices often incorporate a variety of digital storytelling and engagement tools in helping students (through simulations, virtual role playing, etc.) understand how this strategic marketing communication gets conveyed in the modern marketplace (Spanjaard, Garlin, & Mohammed, 2022).

This paper seeks to provide a roadmap for effective marketing strategy teaching and content delivery on both the undergraduate and graduate levels while using a variety of teaching methods that engage various types of students with different types of abilities, focus, maturity levels, and occupational stages of life (Cumbie, Kutz, & Floren, 2023). The marketing strategy course design collaboration laid out in the rest of this paper provides a marketing strategy course design plan that incorporates technological innovation and critical thinking (through simulations and online reflection responses), strategic marketing planning that helps students think through a variety of marketing strategy decisions (specifically from the viewpoint of the customer and their competition), and assignments that encourage students to think about market forces and influences around their decisions (which ultimately impact strategic planning as well as implementation) (Bobrikova, Boiko, Karpenko, Chepil, & Taranenko, 2023; Fitriana, Tiyanto, Wiraya, Hendriyanto, Sahara, Muhaimin, & Putri, 2023; Karkowski, Davis, Whelan-Jackson, & Wolf, 2023). In addition, our course design collaboration incorporates takeaways from COVID-19 pandemic experiences regarding nimble educational delivery methods such as simulations, online course offerings, and digital resources for advanced reading and student reflection (Ntlabathi, Makhetha-Kosi, & Mayaphu, 2023; Tick, Beke, & Fustos, 2023). Thus, this collaborative roadmap for marketing strategy education delivery is technology-forward, able to implemented in online or face-to-face classroom environments, involves students as co-creators in the learning, planning, and decision making, and embraces technological innovation as the backbone of strategic marketing engagement in the marketplace (relating to customers and standing out from competition) (Crittenden, Biel, & Lovely, 2018; Dollinger, Lodge, & Coates, 2018).

THE PROCESS

Collaboration

To meet the aforementioned goals, the faculty member teaching the MBA Marketing Strategy course met with the faculty member who would be teaching the undergraduate version of the course. The first step was establishing student learning goals for each course level. This began with a review of the learning goals set forth in the syllabus of the MBA course. Since both courses were teaching marketing strategy, the learning goals for each course were similar but differed largely in the emphases on the measurement of implementation effectiveness. For example, the strategic marketing plan developed by in the undergraduate course would be evaluated solely by the professor. Meanwhile, the effectiveness of marketing decisions in the MBA course would be measured within a simulation.

Once learning goals for each level were articulated, both faculty performed a thorough review of the content and assignments of the MBA course. Knowing the courses would need to align but not overlap substantially, the faculty sought to take different approaches to the way content would be delivered and student learning measured.

The faculty developed the courses to meet the following descriptions: The undergraduate course would be a true marketing capstone course that was textbook-driven and pulled key concepts from the marketing core curriculum, such as consumer behavior, market research, and digital marketing. A primary learning objective would be the ability to synthesize these concepts and use them to develop a strategic marketing plan. The MBA course would use lectures and current marketing news to drive conversations about core marketing concepts while allowing students to put their knowledge into action via a strategic marketing simulation. In this way, the two courses would share foundations but incorporate significantly different assignments and evaluate students in substantially separate ways. These differences are discussed in further detail in the following sections. We begin with the MBA course since it existed prior to the undergraduate course.

Redevelopment of the MBA Marketing Strategy Course

The redevelopment goals for the MBA course included: a stronger emphasis on strategy implementation, deeper intellectual dives into certain strategic concepts, data/information-driven decision-making, and the evaluation of and reflection on the outcomes of strategic marketing decisions. Further, the course needed to be easily adaptable to both face-to-face and virtual learning formats, as the MBA course is offered in both formats in alternating semesters. Given these overarching goals, the professors decided a simulation would be an appropriate solution and could serve as a backbone around which course assignments could be built.

Given that we redeveloped this course at the same time that the undergraduate Marketing Strategy course was being created, we took advantage of opportunities to purposefully distinguish the courses in ways that would not be possible had the courses been developed independently or if the faculty had not been willing to work together. Below, several substantive development decisions are discussed.

The Textbook Decision

Prior to the redevelopment, the MBA Marketing Strategy course used a textbook. The textbook received particularly helpful feedback from students for its “to the point” structure and its focus on the end-goal of producing a strategic marketing plan (SMP) for an organization. In the past, the course had taken on a “client” from the business community each semester, and students were challenged to develop an SMP for it. While this approach worked well, and the development of an SMP was a meaningful learning experience, we could not answer during the semester the question, “Did it work?”

The challenge became creating a way to deliver master’s level marketing strategy content, keep that content timely and relevant, and leave enough time for students to make marketing decisions and see the results. This is where the marketing strategy simulation would provide high value. As for content, we decided to move the textbook to the undergraduate course. The content void that that decision created would

need to be filled with quality, on-theme material. In the next sections, we elaborate on our approaches to addressing these challenges with graduate-level content.

Incorporating a Simulation

Rather than a textbook and SMP, we decided a simulation would be a great tool to provide content while giving students the opportunity to address realistic marketing challenges, implement strategy, and see the results of those choices in a dynamic, competitive environment. The companies that produce marketing simulations can take considerably different approaches to the role of a simulation within a course, and we wanted one that delivered content in addition to gameplay. Further, we needed the right balance of graduate-level robustness and ease of use. Other factors we considered in our sim selection were: industry familiarity, supplemental tools, support to both professors and students, and cost to the student.

Over each of the next three semesters, a different simulation was incorporated into the MBA course so that both professors and students could evaluate the products. While each had its strengths, we found that the Marketing Strategy – Bikes simulation from Marketplace Simulations was the best fit for our needs and goals (Marketplace Simulations, 2023). The sections below describe some of the ways we balanced the simulation with other assignments and course needs.

Instructional Content in the Absence of a Textbook

Without the structure and readily available content of a traditional textbook, we needed to ensure we could incorporate the right amount and quality of content from other sources. We addressed this need with the following approaches. First, many simulations contain support content and readings, and some even offer a full textbook. The simulation we chose had brief marketing-related readings and an in-depth electronic Help file from which we developed course readings and in-class lectures.

Second, countless open sources of marketing content exist online, and we supplemented the simulation content with blogs, articles, and other web-based materials in cases where we sought additional perspectives or depth. Third, WSJ.com articles provided current, real-world context to the marketing topics we had introduced.

Putting these resources together, a module on Understanding Customer Needs might include initial readings from the simulation followed by an in-class lecture on the subject. Next, we might assign two web-based readings and a recent WSJ.com article that details a company's struggles with an aging product portfolio.

Assignments

With a marketing strategy simulation serving as the course backbone, we used a two-prong approach to developing assignments. First, in cases where we believed students needed exposure to concepts that may receive light or no coverage in the simulation, we developed "stand alone" assignments that did not tie directly to the simulation. For example, we wanted students to understand the vital role of customer experience (CX), which is not directly measured in the simulation. So, we developed a CX module that consisted of readings, a lecture, and two assignments: 1) an analysis of a WSJ.com article focusing on CX and 2) creating a customer journey map.

Second, to further invest students in the simulation and its content, we utilized auto-assessed assignments built into the simulation (e.g., topic-specific microsimulations) and created assignments that extended the simulation content in a new direction. As an example of the latter, at approximately the midway point in the simulation, students create and deliver to the professor a "boardroom presentation" where they explain their performance to date and what they will do in the next round to maintain or improve upon it. These are robust presentation assignments that require substantial analysis of results-to-date and preparation.

DEVELOPMENT OF THE UNDERGRADUATE MARKETING STRATEGY COURSE

In this section, one will unpack specific differences in our approach to teaching marketing strategy to senior-level undergraduates. One of the clearer structural differences is the use of a textbook in the undergraduate course. As noted earlier, the textbook that previously had been used in the MBA course was shifted to the undergraduate course so that students would have a more traditional structure and resources for the course. The now-undergraduate course textbook, *Marketing Strategy* by Ferrell & Hartline (2017) focuses on the creation of a strategic marketing plan (SMP). As such, course assignments were built to support that focus, and the course culminates with the creation of an SMP for a fictitious business – but with real-world circumstances, details, context, and practicality.

Here, we discuss the creation (with scenario background), teaching and implementation, and evaluation of the SMP for an undergraduate marketing strategy course that was designed for undergraduate seniors as a "capstone" course for marketing majors. An SMP serves as a blueprint or road map for the marketing strategy of a firm, and also helps employees and constituents know, understand, and execute their roles and functions within the plan (Ferrell & Hartline, 2017). SMPs also provide specific information related to the allocation of resources and lay out (when done well) specific marketing tasks, responsibilities and duties of individuals involved in any strategic marketing decisions for the firm or organization. It is crucial that the SMP align with a firm or organization's overall mission (why we exist), vision (where are we going?), and core values (non-negotiables of operation), and have clear connection and alignment with the overall corporate or organizational strategy on a macro-level (Ferell & Hartline, 2017).

The Creation of a Strategic Marketing Plan (SMP)

In the undergraduate Marketing Strategy course, students are charged (within randomly generated student groups) with the creation of an SMP for a fictitious Mexican restaurant that would be built in an actual shopping area near our campus. Undergraduate students have greatly enjoyed this real-life project because it allows students to create an SMP that could actually be put into use for a new business (in this case a Mexican restaurant). In addition, by focusing in the undergraduate Marketing Strategy class on the creation of an SMP for a potential business (in a real world context), it allows students to not only be creative and think outside the box, but puts undergraduate students in the actual business context of making and implementing strategic marketing decisions that must think about one's customers (existing and potential) as well as competition (current and potential); which are the two crux's of true marketing strategy in the corporate context (Ferrell & Hartline, 2017).

In terms of the sections of a SMP; a robust and well thought out SMP contains the following sections: an executive summary highlighting the entire plan and focus, the situation analysis which studies, explains, and evaluates the internal environment of the firm along with one's customer base and competition (external environments), a SWOT analysis stating and unpacking the strengths, weaknesses, opportunities, and threats of the strategic marketing decisions, and the marketing goals and objectives (GBO's) related to building out and executing the strategic marketing planning and decision making (Ferrell & Hartline, 2017).

Teaching and Implementation of the Strategic Marketing Plan

As undergraduate student groups start to create their unique "Strategic Marketing Plans" or SMP's for their fictitious Mexican restaurants within the real-world context and scenario laid out in the project, they also begin to work through timelines for deliverable parts of the SMP until the entire plan is completed by the end of the semester (whether in a fall or spring semester, or condensed summer semester). Specifically, each undergraduate student group is required to turn in parts of the SMP throughout the semester (based on specific timelines and due dates) to ensure that each group is working on their SMP on an ongoing basis, but also to help undergraduate student's work through the creation and learning of the SMP on an incremental basis to maximize understanding, attentional to detail, and contextual application. In addition, every student group in the class is working on the afore mentioned specific parts of their SMP while reading chapter quizzes in *Marketing Strategy* by Ferrell and Hartline (2017), taking quizzes over these chapters after reading and engaging in chapter lectures and conversations, and also writing reflection and update

posts to their professor on the ongoing progress of their developing SMP's. All these crucial steps related to the teaching and learning surrounding the SMP's happen over the course of the semester, and prepare the undergraduate students effectively to submit their SMP's and be evaluated based on real world criteria, analysis, and strategic marketing execution measures.

Evaluation of the Strategic Marketing Plan

As undergraduate students in the "Marketing Strategy" class complete the different sections of the "Strategic Marketing Plan" (SMP) and submit the entire SMP as a major component for course completion, the faculty member teaching the class then evaluates and grades each group's SMP based on the grading rubric provided in Appendix A below. The grading rubric provides clear and concise guidelines related to what is included in the SMP, provides an exact page length that each SMP needs to be (20 pages) for detail and thoroughness, provides helpful reference to points for each section of the project, and also provides clear guidance related to what major details need to be in every major component (section) of the SMP. Every undergraduate student group is evaluated in the same manner based on the grading rubric in Appendix A, and feedback is then provided by the faculty member after the grading rubric has been used to analyze, evaluate, grade, and reflect on each group's submitted SMP. Finally, the faculty member also provides real world context of how these specific SMP's could be used to create a restaurant that would fit into this existing outdoor shopping and dining center, and seeks to include in the comments of feedback the parts of each group's SMP that would translate seamlessly to actual restaurant creation. In addition, the parts that would need to continue to be enhanced if an SMP would actually be presented to a restaurant group (or related business or concept) are highlighted for improvement if any of the students would ever want to continue to on (in their own career pursuits) with the ideas generated from their work on their SMP's.

CONCLUSION

Our goal was to develop distinct but complementary undergraduate and graduate Marketing Strategy courses. Doing so required the two faculty members to collaborate on course design, resources, and assignments. While core marketing strategy content is the same at both levels, the professors developed distinct ways of incorporating marketing content and evaluating student performance. The result is an upper-level marketing undergraduate course with strategic marketing content and principles designed for entry into the corporate world and advanced marketing analysis and implementation exercises for graduate students seeking deeper development and application of strategic marketing decision-making. The collaboration achieved congruency in philosophy with divergence in teaching approaches, assignments, and assessment.

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APPENDIX: STRATEGIC MARKETING PLAN (SMP) GRADING RUBRIC

Date: **Students:**

Grade Components	Comments	Points
SMP is grammatically correct, professionally laid out/formatted, every needed section is present, page numbers, complete in detail (20 pgs.)		18
Use of Visuals/Pictures are in the SMP, laid out appropriately and clearly, and represent each section well		17
Executive Summary is complete, detailed, has a synopsis and major aspects of the marketing plan		33
Situation Analysis has a detailed analysis of the internal, customer, and external environments		33
SWOT Analysis: sections (a-g) on page 38 are present, detailed, and complete		33
Marketing Goals and Objectives are clearly laid out, defined, present		33
The Marketing Strategy: sections (a-f) on page 38 are present, detailed, and clearly defined. SMP is concluded appropriately and professionally…		33
Total	**Overall:**	Total= 200