MKT 382 BRAND MANAGEMENT

SPRING 2013

Professor	**Susan Broniarczyk**
Course	**MW 12:30-1:45 UTC 1.116**
Office	CBA 7.226
Office Hours	**MW 2:00-3:30 and by appointment**
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Course Web Page	via Blackboard
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Course Objectives

The most valuable asset many firms have is their brand. In our global economy, production and distribution can be replicated. But the knowledge, attitudes, and emotional connection consumers have about their brands cannot. Therefore many companies recognize that the investment they make in the creation and communication of their brand will become a strategic differentiator in the future. This class will focus on how to establish and grow brand equity, how to measure brand equity, how to manage brand architecture, and how to utilize brand equity to create more profit and growth for your company.

Leadership and this Course

The Texas MBA program is designed to develop influential business leaders. The MBA Program has identified four fundamental and broad pillars of leadership: knowledge and understanding, communication and collaboration, responsibility and integrity, and a worldview of business and society.

In this course, you will enhance your knowledge and understanding of brands and learn how to strategically develop and grow these valuable assets. You will enhance your collaboration skills through a team case analysis and team project. Integrity in brand management is critical and my hope is that you will leave this course knowing the importance of understanding what your customer wants and providing that honestly within the context of your brand. Brand marketing is a way to communicate the value and benefits of your company and/or product to consumers. A brand is a promise to your consumer and you will learn how to manage brands to fulfill this promise.

Materials

Course Reading Packet (CP): Required
Jenn's Copy & Binding (www.jennscopies.com)
2200 Guadalupe

Everyone must purchase their own copy of the packet. Do not share copies of the packet as this is a violation of copyright. I teach both an undergraduate and graduate brand course **so be certain to purchase the MBA MKT 382 course packet.**

Blackboard Readings (BB): Required

Powerpoint slides will be posted after class.

Course Philosophy

My basic teaching philosophy for this course is to blend the theory and practice of product and brand management in a comfortable, supportive classroom environment that promotes active learning. A good theory is invaluable because it structures problems and suggests possible solutions. **My view is that the most critically important consideration in branding is understanding the customer, hence many theories covered will be from a consumer behavior perspective.**

Branding is both an art and a science. Thus, few branding situations have a definitive, unqualified answer as to the "best" marketing programs. Yet, my belief is that by providing you with relevant and comprehensive theories, and all the accompanying ideas, concepts, mechanisms, and models that go along with that, you can make more informed decisions that will have a greater probability of success.

The course readings and activities are designed to help blend theory and practice. The readings will cover the basic concepts and theoretical frameworks as well as provide current thinking on key topics. Cases will allow us to apply these theories to real marketing problems. Guest speakers will be used to illustrate current brand issues and the tension between theory and practice.

Each member of the class is a key part of the learning process. We learn from the insights and experiences of each other. I expect you to come to class prepared, ask questions and participate, and be respectful of your fellow students.

Course Requirements and Grading

Your grade in the course will be determined as follows:

	Points
Case Applications	40
Case Analysis	120
In-Class Contribution	100
Team Brand Meaning Audit I: Interviews	30
Team Brand Meaning Audit II: Twitter	20
Team Brand Inventory	30
Team Final Project and Presentation	110
	450

Grade Basis:

A 93-100%	B+ 87-89%	C+ 77-79%	D+ 67-69%
A- 90-92%	B 83-86%	C 73-76%	D 63-66%
	B- 80-82%	C- 70-72%	D- 60-62%
			F below 60%

Re-grading. Requests to have a grade reconsidered should **be submitted in writing**. If you would like to submit a request, or if you would just like to discuss your grade in general, wait at least 48 hours after an assignment is returned to you. This timing will facilitate a rational, objective discussion of the merits of the case. No re-grading will be considered more than 10 days after the assignment is returned to you, unless it is a matter of a math error, which will always be cheerfully corrected.

Description of Requirements

<u>Case Applications</u> (2@20 points each = 40 points)
Case applications are one page, typed (single-spaced,1" margins, 12-point type) and **two (2) hard copies are due at the beginning of class** (no exceptions!). Each assignment is worth 20 points.

> **New Coke:** Assess original Coke's brand equity using Keller's CBBE pyramid. For each CBBE dimension: 1) identify associations held by Coke, and 2) assess the strength, favorability, and uniqueness of the associations.
>
> **Dove:** Write 3 positioning statements. The first positioning statement is for Dove in the 1950's. The second positioning statement is for Dove in 2007. The third positioning statement is for yourself. The positioning statements should be in the following format:
>
> Positioning Statement:
> *<u>Product/Brand</u>*
> Is *<u>Unique and Most Important Claim</u>*
> Among All *<u>Competitive Frame</u>*
> For *<u>Target Market</u>*
> Because *<u>Support, Reasons Why</u>*

<u>Case Analyses</u> (3@40 points each = 120 points)
You are required to submit case analyses from the following 4 cases:
Ford Fiesta
Giant Consumer Products
Diesel
Samsung

Appendix A contains case analysis decision and case preparation questions to reflect on as you render your decision for each case.

The format for the case analysis is a two-page recommendation regarding the case decision. The first page is single-spaced (1" margins, 12-point type) written case recommendation. The second page is an appendix page of pros and cons and supporting evidence and analyses. **See Appendix B for suggested case analysis format**.

A written case recommendation is a formal proposal submitted to management. When writing a case analysis, consider the following points:

1) Your recommendation needs to be very tightly argued. You may use "bullet" point form for part of your argument. However, be careful not to be too cryptic.
2) Do not simply restate data from the case. The CEO is already familiar with the business!
3) On the other hand, take every opportunity to <u>support</u> your arguments with case data. Ask yourself, "Is there any objection the boss could raise that I have not already overcome?" Then do your best to overcome it.
4) Provide supporting evidence from analysis of case data in Appendix.) Crunch the numbers to support your points (e.g., sales have increased by X%, brand awareness has declined by X%). Show how your recommendation is more profitable than alternative recommendation(s). **It is assumed that you have mastered marketing financial analyses in your McCombs MBA core.**

The Ford Fiesta case analysis may be completed with a partner or individually. All other case analyses (Giant Consumer Products, Diesel, Samsung) are individual assignments and should be worked on independently (i.e., no discussion with a classmate). Case discussions and analyses are restricted to material presented in the case. Do NOT incorporate any material from outside the case in your analyses. Each case analysis will be worth a maximum of 40 points. **Two (2) hard copies of case analyses are due at the beginning of the class.**

<u>In-Class Contribution</u> (100 points)

<u>In-Class Contribution.</u> In-class contribution is evaluated on the quality of your participation and its contribution to improving the learning experience of the class. **Note that quality is not necessarily a function of quantity.** You will be evaluated according to the following guidelines:

> *Outstanding (3)*: Contributions provided major insights as well as a fruitful direction for the class. Arguments were well-supported (with tangible evidence) and persuasively presented. If this person were not a member of the class, the quality of the class discussion would have been significantly diminished.
>
> *Good (2):* Contributions were on-target, fairly well-supported and persuasive. If this person were not a member of the class, the quality of the discussion would have been slightly diminished.
>
> *Attending Non-participant (1)*: Contributed nothing to the class discussion. A person attends class but is silent and does not participate in the class' discussion.
>
> *Repetitive (0):* If a person's class comments were repetitious and obvious and did not add value to the class. That is, you will be penalized for "airtime" without value.
>
> *Unsatisfactory (-1)*: Unsatisfactory contribution occurs if inadequate preparation. If this person were not a member of the class, the quality of the discussions would have been enhanced.
>
> *Absent or Late (-1)*: Obviously, one cannot participate if one is absent from the course. Absences are severely frowned upon. You are granted two (2) absences (i.e., free pass) so use them wisely (illness, interviews) between January 14 – April 17. **After that, if due to extenuating circumstances, you must miss class, a one page executive summary of that session's readings and cases must be submitted *prior* to the class** to receive a comparable credit for attending non-participant (1 point), otherwise the participation points for that day will be –1. A person who disrupts the class by coming in late will receive a –1 participation points.
>
> Note attendance at brand audit presentations the last two weeks of the semester is **mandatory.** First, you benefit from the brand learnings and insights of your classmates. Second, your classmates benefit from your input as your ratings of the presentations will factor into their presentation grades. Absence from a brand audit presentation day will be penalized -3.
>
> Final in-class contribution grade will be determined by a curve with median class contributor receiving a grade of 90 points and typical distribution between 80-100 points. Several updates on your participation points will be provided during the semester.

Brand Audit

Self-selected teams consisting of 5 members will conduct a brand audit. The goal of the brand audit is to conduct an in-depth examination of a major brand of your choosing and suggest ways to improve and leverage that brand equity. **The criteria for choosing a brand lies in the brand's: 1) interest/value to you, 2) consumers' likely familiarity with the brand, 3) access to the brand's target market and 4) access to brand and company information, and 5) brand presence in social media conversations. To insure that every team starts on equal footing, you may not select a brand that a team member or their family has worked for.** Selecting a brand undergoing a challenge regarding its brand architecture, brand portfolio, brand extension, or brand revitalization generally provides greater fodder for critique. Every team must study a different brand. A good source of possible brands is Jan. 14 readings ("Best Global Brands 2012:Interbrand," "BrandZ Top 100 Most Valuable Global Brands"). For family or corporate brands, consider a specific product brand in order to narrow your focus and provide a specific frame of reference and competition (e.g., Toyota Camry rather than overall Toyota brand).

All Brand audit deliverables should be emailed prior to class to mkt382@gmail.com.

1. **Team Brand Selection (0 Points; Feedback Provided)**
   The first installment of the brand audit is **due on Friday, February 1.** In a 2-3 page Word document, teams need to notify me regarding team membership and the top three brands you are interested in studying and their associated challenge. This deliverable is not graded; however investing effort here in brand selection will pay huge dividends in a quality final brand audit project. The deliverable is to:

   1) Identify team members
   2) Rank order the top three brands your team is interested in for brand audit project.
   3) For each brand:
      a. Identify two (2) challenges the brand is facing
      b. Each challenge should be supported with research evidence from at least two (2) references.
      c. References should follow appropriate APA citation format (see BB posting)

2. **Brand Meaning Audit I: Preliminary Consumer Exploratory using ZMET and In-Depth Interviews (30 points)**
   This second installment of the brand audit is due on **Monday, February 18**. Its purpose is to help you understand the brand through the eyes of the consumer: what does the brand mean; where does it stand? This exploration into the brand's meaning serves a foundational role in your brand planning recommendation as it defines current sources of brand equity and suggests areas for improving or leveraging that equity.

   This project deliverable has two components:

   1) Each team will complete a minimum of 4 ZMET and 4 in-depth laddering interviews. Complete transcripts of these interviews including scanned images from ZMET should be included in a Word appendix. Interview question and answers in bullet form are OK as long as capture complete insight.
   2) Generate a preliminary summary of the brand's customer-based brand equity pyramid in 7-8 Powerpoint slides (use notes to elaborate).
      a. Assess the brand's associations for each component of the CBBE pyramid.
         i. Identify associations.
         ii. Assess strength, favorability, and uniqueness of associations.
         iii. Assess commonalities and differences across participants and interviews.
         iv. Utilize verbatim quotes or images to support conclusions.
      b. Conclusion slide assessing overall CBBE and update of brand challenge(s).

3. Brand Meaning Audit II: Consumer Exploratory using Twitter Postings (20 points)

This third installment of the brand audit is **due on Wednesday, February 27**. Its purpose is to help you understand the brand through the eyes of the consumer based on social media postings.

This project has two deliverables:

1) Monitor Twitter comments on your brand for at least a 7-day period using www.twilert.com. Submit a Word appendix with a log of Twitter comments.
2) Generate an analysis of the Twitter comments related to your brand in 4-5 Powerpoint slides (use notes to elaborate).
   a. Identify top 5 associations and link to CBBE.
      i. Assess strength, favorability, and uniqueness of associations.
      ii. Assess commonalities and differences across Twitter comments.
      iii. Utilize verbatim comments to support conclusions.
   b. Assess the volume of Twitter comments to inform consumer engagement and brand resonance.
   c. If possible, identify brand "influentials" based on posts and retweets who significantly affect the brand conversation.
   d. Update your preliminary CBBE (from ZMET & in-depth laddering interviews) to incorporate Twitter comments and comment on consistencies and inconsistencies. Update brand challenge(s).

Note that many Twitter comments may be random, irrelevant, or hard to categorize. Do your best to gain insight for your brand audit from this social media outlet.

4. Team Brand Inventory (30 points)

The team brand inventory is the fourth installment of the brand audit **due on Monday, April 1.** It involves developing a comprehensive summary of the brand as viewed and enacted by the company that manages it. To do this, you will need to review and describe the marketing program supporting the brand, critically analyze how the brand has been crafted and developed, and assess its market and competitive situation. This perspective on brand meaning provides you with a historical perspective and foundation for the brand.

This project deliverable has six components:

1) Summary positioning statement deduced from brand's marketing and advertising activities.
2) Profile competitive brands and market situation.
3) Brand identity inventory. What are the specific brand identity elements (e.g., logos, names, taglines, packages, etc.) that support and convey the desired positioning for the brand? Critique the effectiveness of these elements in promoting and building the brand's equity.
4) Brand marketing inventory. Succinctly summarize how the brand has been built through marketing programs across time. Assess the marketing mix elements (4Ps) that support and convey the desired positioning for the brand. Have these elements been effective in building equity for the brand? What is the current effectiveness of marketing programs?

   i) Analyze the brand's past and current advertising and social campaigns.
   ii) Analyze the brand's product, promotions, distribution, and pricing.
5) Detail the brand architecture.
      i. Graphically display the brand hierarchy.
      ii. Discuss the roles of brands in the portfolio. Focus on your selected brand and other brands deemed relevant to your brand.
      iii. Discuss the hierarchy relationship of your brand.
6) Update brand challenge(s).

The brand inventory deliverable is a maximum of ten (10) Powerpoint slides (use notes page to elaborate on slides) that comprehensively addressing the six components. Inventory should include substantial supporting documentation (use MLA citation) and data on market share, industry trends, advertising spend, product assortment, price and promotion comparison data. Emphasis is placed on critical analysis of this data and not simply descriptive reporting.

5. Brand Surveys (0 points; Feedback Provided)

1) State your current brand challenge(s). Develop a 12-15 question survey to gather further supporting evidence for key information in CBBE pyramid and brand challenges. A minimum sample of 60 members of target market is required. A draft is **due on Monday, April 8**. Each team should schedule a 20 minute meeting outside class with Dr. B the week of April 8 to discuss your survey draft.

2) Develop a brief follow-up survey (5-8 questions) to test consumer's response to potential recommendations. A minimum sample of 25 members of target market is required. (Note the sample may overlap with the previous sample for the first survey.) Teams may proceed on their own using their expertise garnered in the first survey. Dr. B is available as a consultant, with teams welcome to either make an appointment or email survey draft for feedback.

Many teams will do a comparison between users (e.g., light versus heavy users) and thus will need a larger sample size to make significant comparisons. Each team is responsible for obtaining access to target market for survey (think creatively such as posting on brand or category user groups on Web, use snowball sample where ask people to pass survey link along to relevant others, or visit location where target market is likely to be with paper surveys to distribute). For the questionnaire you may choose to utilize on-line survey option of McCombs' Qualtrics subscription or old-fashioned pencil and paper surveys.

6. Final Report and Presentation (110 points)

The final presentation is worth 30 points and the final report is worth 80 points. The final report is due by 3pm on **Friday, April 26**. The final report consists of brand exploratories from ZMET, in-depth laddering interviews, Twitter comments, and surveys, brand inventory, and provides recommendations concerning how to build and manage equity for the brand chosen. Your report deliverable is maximum 25 slides with notes plus appendix.

Components of Final Brand Audit Report (sequence may vary)

1. History and Overview

The first page is an overview of the brand and its history. Include a statement of brand's positioning.

2. Key Challenges Facing Brand

The second page should set-up the key challenges facing brand. The challenges may relate to brand architecture, brand portfolio, brand extension, and/or brand revitalization.

3. Brand Inventory

Brand inventories are comprehensive summaries of a firm's marketing and branding program.

a.) Detail the brand architecture.
   i. Graphically display the brand hierarchy.
   ii. Discuss the roles of brands in the portfolio. Focus on your selected brand and other brands deemed relevant to your brand.
   iii. Discuss the hierarchy relationship of your brand.

b.) Analyze the firm's branding and marketing programs. How do they contribute to brand knowledge? How consistent have they been over time? Is there consistency between the brand and marketing elements?
   i. Analyze the brand graphics (logos, names, packages).
   ii. Analyze the brand's past and current advertising and social media campaigns.
   iii. Analyze the brand's product, promotions, distribution, and pricing.

c.) Profile competitive brands and market situation.

4. Brand Exploratory

   Brand exploratories are in-depth profiles of consumers' brand knowledge structures.

   a.) Develop a detailed and accurate profile of current brand knowledge structures. In appendix, provide specifics about ZMET, in-depth laddering interviews, and survey data collection to assess brand knowledge structures.
   b.) Assess the brand's associations at each level of CBBE pyramid. Critique this customer-based brand equity. What meanings are strong and dominant? Which are unique from competition? Which are positive and negative? Do meanings resonate with target market?

5. Recommendations

   Make 3-4 recommendations to the brand concerning how the brand should be managed over the next 5 years by critically analyzing the brand inventory and brand exploratory. Your recommendations need to be supported by data from your brand inventory and brand exploratory. Recommendations may address:

   1) consistency between consumer-based brand equity meaning and firm's perception of brand equity meaning
   2) effectiveness of brand identity and brand marketing program
   3) effectiveness of brand management strategies over time and suggestions to revitalize and rejuvenate the brand
   4) opportunities to leverage the brand including brand extensions

The Appendix is a Word document that should contain:

1) Summary of in-depth interviews and ZMET
2) Summary of Twitter postings
3) Data collection instrument for each survey
   a. Number of respondents to each questionnaire
   b. Description of sample (gender, age, residence, usage)
   c. Summary of responses to each instrument

All survey-based data included in the presentation should come from surveys in the appendix and it should be easy to link statistics in presentation to the relevant study in the appendix.

Each team will also present their brand audit to the class in 20-minute presentations the last three classes of the semester.

Each of you will be asked to evaluate the contribution of your team peers at the conclusion of the course. These evaluations will be used in determining project evaluations. Each student will receive a team project grade that is proportionate to their participation, as assessed by other team members.

Brand Audit Due Dates:

2/1 Three Brands and Challenges

2/18 Brand Meaning Audit I: Preliminary Consumer Exploratory using ZMET & In-Depth Interviews

2/27 Brand Meaning Audit II: Consumer Exploratory using Twitter Postings

4/1 Team Brand Inventory

4/8 Brand Surveys

4/26 Final Brand Audit Project Due

4/24-5/1 Presentations

McCombs Classroom Professionalism Policy

The highest professional standards are expected of all members of the McCombs community. The collective class reputation and the value of the Texas MBA experience hinges on this.

Faculty are expected to be professional and prepared to deliver value for each and every class session. Students are expected to be professional in all respects.

The Texas MBA classroom experience is enhanced when:

- **Students arrive on time.** On time arrival ensures that classes are able to start and finish at the scheduled time. On time arrival shows respect for both fellow students and faculty and it enhances learning by reducing avoidable distractions.
- **Students display their name cards.** This permits fellow students and faculty to learn names, enhancing opportunities for community building and evaluation of in-class contributions.
- **Students minimize unscheduled personal breaks.** The learning environment improves when disruptions are limited.
- **Students are fully prepared for each class.** Much of the learning in the Texas MBA program takes place during classroom discussions. When students are not prepared they cannot contribute to the overall learning process. This affects not only the individual, but their peers who count on them, as well.
- **Students respect the views and opinions of their colleagues.** Disagreement and debate are encouraged. Intolerance for the views of others is unacceptable.
- **Laptops are closed and put away.** When students are surfing the web, responding to e-mail, instant messaging each other, and otherwise not devoting their full attention to the topic at hand they are doing themselves and their peers a major disservice. Those around them face additional distraction. Fellow students cannot benefit from the insights of the students who are not engaged. Faculty office hours are spent going over class material with students who chose not to pay attention, rather than truly adding value by helping students who want a better understanding of the material or want to explore the issues in more depth. Students with real needs may not be able to obtain adequate help if faculty time is spent repeating what was said in class. There are often cases where learning is enhanced by the use of laptops in class. Faculty will let you know when it is appropriate to use them. In such cases, professional behavior is exhibited when misuse does not take place.
- **Phones and wireless devices are turned off.** We've all heard the annoying ringing in the middle of a meeting. Not only is it not professional, it cuts off the flow of discussion when the search for the offender begins. When a true need to communicate with someone outside of class exists (e.g., for some medical need) please inform the professor prior to class. **<u>If your phone or wireless device interrupts the class, you will apologize to your classmates by bringing a treat for all to the next class.</u>**

Remember, you are competing for the best faculty McCombs has to offer. Your professionalism and activity in class contributes to your success in attracting the best faculty to this program.

Academic Dishonesty

I have no tolerance for acts of academic dishonesty. Such acts damage the reputation of the school and the degree and demean the honest efforts of the majority of students. The minimum penalty for an act of academic dishonesty will be a zero for that assignment or exam.

The responsibilities for both students and faculty with regard to the Honor System are described on http://mba.mccombs.utexas.edu/students/academics/honor/index.asp and in Appendix C of this syllabus. As the instructor for this course, I agree to observe all the faculty responsibilities described therein. During Orientation, you signed the Honor Code Pledge. In doing so, you agreed to observe all of the student responsibilities of the Honor Code. If the application of the Honor System to this class and its assignments is unclear in any way, it is your responsibility to ask me for clarification.

Students with Disabilities

Upon request, the University of Texas at Austin provides appropriate academic accommodations for qualified students with disabilities. Services for Students with Disabilities (SSD) is housed in the Office of the Dean of Students, located on the fourth floor of the Student Services Building. Information on how to register, downloadable forms, including guidelines for documentation, accommodation request letters, and releases of information are available online at http://deanofstudents.utexas.edu/ssd/index.php. Please do not hesitate to contact SSD at (512) 471-6259, VP: (512) 232-2937 or via e-mail if you have any questions.

Class Web Sites and Student Privacy

A useful feature in Blackboard is a class e-mail roster that is available to both the instructor and the students in a class. While this electronic class roster can facilitate collaboration it also raises some privacy concerns. Below is the University's policy on this matter:

Password-protected class sites will be available for all accredited courses taught at The University. Syllabi, handouts, assignments and other resources are types of information that may be available within these sites. Site activities could include exchanging e-mail, engaging in class discussions and chats, and exchanging files. In addition, class e-mail rosters will be a component of the sites. Students who do not want their names included in these electronic class rosters must restrict their directory information in the Office of the Registrar, Main Building, Room 1. For information on restricting directory information see: http://www.utexas.edu/student/registrar/catalogs/gi04-05/app/appc09.html.

Course Schedule

Jan. 14 M **Intro**

"Best Global Brands 2012: Interbrand" **(BB)**

"BrandZ Top 100 Most Valuable Global Brands 2012" **(BB)**

"The Brand Called You"
By Tom Peters, fastcompany.com, December 18, 2007 **(BB)**

Jan. 16 W **Customer-Based Brand Equity**

"Brand Resonance and the Brand Value Chain"
By Kevin Lane Keller, *Strategic Brand Management*, 4ed, 2013, Chapter 3, pp.78-112. **(CP)**

"Move Over, Cow: Almond Milk Sparks Fight in Dairy Case"
By Anne Marie Chaker, *Wall Street Journal*, January 12, 2011 **(BB)**

"Volvo Will Buff Its Brand"
By Norihiko Shirouzu, *Wall Street Journal*, August 19, 2010 **(BB)**

"Wal-Mart's Makeover"
By Geoff Colvin, *Fortune*, December 26, 2011 **(BB)**

"Is Brand Loyalty the Core to Apple's Success?"
By Scott Goodson, *Forbes*, November 27, 2011 **(BB)**

Due: Email resume to TA Ashley Weber (Ashley.Weber@mba13.mccombs.utexas.edu)
Subject line: Brand resume – *last name*

Jan. 21 M **MLK Holiday**

Jan.23 W **Power and Creation of Brands**

Case Application: Introducing New Coke
(Harvard Business School 9-500-067) **(CP)**

Review "Brands and Branding"
By Douglas Holt
(Harvard Business School 9-503-045) **(CP)**

"There's a Sucker Born in Every Medial Prefrontal Cortex"
By Clive Thompson, *New York Times*, October 26, 2003. **(BB)**

Jan. 28 M **Brand Audit**

Brand Audit Sample **(BB)**

Guest Speaker: April Kessler, Business Librarian, University of Texas Libraries

"Discovering Your SMM Competitors"

By Shiv Singh and Stephanie Diamond, Social Media Marketing for Dummies, 2nd ed. 2012, pp. 31-51. **(CP)**

Citation Format APA Handout available at University Writing Center:
http://www.lib.utexas.edu/refsites/style_manuals.html

Sign up to receive Google Alerts and Twitter Alerts for your brand.

Jan. 30 W Brand Positioning

"Three Questions You Need to Ask About Your Brand "
By Kevin Lane Keller, Brian Sternthal, and Alice Tybout, *Harvard Business Review*, Sept. 2002, pp. 80-86. **(CP)**

"Amazon Fights the iPad with 'Fire"
By Stu Woo and Jeffrey Trachtenberg, *Wall Street Journal*, September 29, 2011 **(BB)**

"The Happy-Time Network"
By Amy Chozick, Wall Street Journal, April 22, 2011 **(BB)**

"How Talbots Got the Girl – And Lost the Woman"
By Ashley Lutz, Bloomberg Businessweek, June 20-26, 2011 **(BB)**

"Jitterbug – calling to seniors"
By Barry Silverstein, brandchannel.com, November 3, 2008 **(BB)**

Feb.1 F Project Due: Three Potential Brands and Challenges
Email Dr. B by 5:00

Feb. 4 M Brand Positioning

Case Application: Dove: Evolution of a Brand
(Harvard Business School 9-508-047) **(CP)**

"Unilever Gives 'Ugly Betty' a Product-Plug Makeover in China"
By Geoffrey A. Fowler, *Wall Street Journal*, B1, December 23, 2008. **(BB)**

"Unilever's Dove Dives into Male Grooming"
By Tobi Elkin,www.emarketing.com, April 6, 2010. **(BB)**

Reread "The Brand Called You"
By Tom Peters, fastcompany.com, December 18, 2007 **(BB)**

Feb. 6 W Measurement of Brand Equity: Customer Mindset

"Seeing the Voice of the Customer: Metaphor-Based Advertising Research,"
By Gerald Zaltman and Robin Higie Coulter, *Journal of Advertising Research*, July/August 1995, 35-51. **(BB)**

"Using laddering to understand and leverage a brand's equity"
By Brian Wansink, *Qualitative Market Research*, Volume 6, No. 2, 2003, pp.111-118. **(BB)**

"Drilling for Nuggets: How to Use Insight to Inspire Innovation"
By David Taylor, Brand Strategy, March 2000 **(BB)**

Feb. 11 M **Integrated Marketing Communications: Social Media Marketing**

"Branding in the Digital Age: You're Spending Your Money in All the Wrong Places"
By David C. Edelman, Harvard Business Review, December 2010
(HBR Reprint R1012C) **(CP)**

"Social Media"
By Sunil Gupta, Kristen Armstrong, and Zachary Clayton
(Harvard 9-510-095) **(CP)**

"Can You Measure the ROI of Your Social Media Marketing?"
By Donna L. Hoffman and Marek Fodor, *MIT Sloan Management Review*, Fall 2010
(Reprint 52105) **(CP)**

Profiles of Major Media Types **(BB)**

"Which Ad Strategy Works Best for You?"
By Rosalind Resnick, *Entrepreneur* excerpt, August 14, 2009 **(BB)**

Feb. 13 W **Social Media Marketing**

Partner Case Analysis: The Ford Fiesta
(Harvard Business School 9-511-117) (CP)

"Why Consumers Rebel Against Slogans"
By Juliano Laran, Amy N. Dalton, and Eduardo B Andrade, Harvard Business Review, November 2011, p.34 (HBR Reprint F111C) **(CP)**

Feb. 18 M **Brand Names & Logos**

"Brand Shortcuts"
By Kevin Lane Keller, Marketing Management, September/October 2005, pp.19-23. **(BB)**

"Naming names: Trademark strategy and beyond: Part I"
By Ross D. Petty, *Journal of Brand Management*, January 2008, 190-197 **(BB)**

"Are all the good tech-company names taken?"
By Natalie Avon, www.cnn.com, 10/05/2010 **(BB)**

"Warmer, Fuzzier: The Refreshed Logo"
By Bill Marsh, *The New York Times*, May 30, 2009. **(BB)**

"Web Addresses Enter New.Era"
By Sam Homes and Christopher Rhoads, Wall Street Journal, June 21, 2011 **(BB)**

Check out: www.99designs.com and logotournament.com. These on-line design forums enable brand entrepreneurs to obtain inexpensive logos by offering prize money to winner of logo competition.

Project Due: Brand Meaning Audit I: Preliminary Consumer Exploratory using Interviews

Feb. 20 W **Pricing: Private Label and Fighter Brands**

"Downsized! More and more products lose weight"
Consumer Reports, February 2011, 18-21 **(BB)**

"Store Brands Step Up Their Game, and Prices"
By Hannah Karp, *Wall Street Journal*, January 31, 2012 **(BB)**

"Private Label Chic at Trader Joe's"
By Beth Kowitt, Fortune, September 6, 2010, p.89 **(BB)**

If Brands Are Built Over Years, Why Are They Managed Over Quarters?
By Leonard Lodish and Carl Mela, *Harvard Business Review*, July-August 2007 **(CP)**

In-Class Exercise: Superstar Organic Salad Dressing (BB)
Sales Promotion & Cannibalization

Optional: "Financial Aspects of Marketing Management"
By Roger A. Kerin and Robert A. Peterson, Chapter 2 in *Strategic Marketing Problems*, Prentice Hall, 9th ed., 33-50 **(CP)**

Feb. 25 M **Brand Promotions**

Individual Case Analysis: Giant Consumer Products: The Sales Promotion Resource Allocation Decision
(Harvard Business School 4131) **(CP)**

"Should You Launch A Fighter Brand?
By Mark Ritson, *Harvard Business Review*, October 2009, (Reprint R0910K). **(CP)**

"Coach's New Bag"
By Susan Berfield, BusinessWeek, June 29, 2009, 41-43. **(BB)**

Feb. 27 W **Guest Speaker, Leslie Vesper**
Director, Dr. Pepper Brand Marketing, Dr. Pepper Snapple Group

Project Due: Brand Meaning Audit II: Consumer Exploratory using Twitter Postings

March 4 M **PLUS**

March 6 W **PLUS**

March 11 M **SPRING BREAK**

March 13 W **SPRING BREAK**

March 18 M **Brand Architecture & Brand Extensions**

"Brand Relationship Spectrum"
By David Aaker and Erich Joachimsthaler, *California Management Review*, Vol. 42, No. 4, Summer 2000, 8-23 **(BB).**

"P&G Puts Its Big Brands To Work in Franchises"
*Bloomberg Businesswee*k, Sept. 6-12, 2010, p.20 **(BB)**

"Angry Birds in US Retail, UK parks push"
Reuters, *Chicago Tribune*, March 21, 2012 **(BB)**

March 20 W **Guest Speaker: Michele Grieshaber**
Vice President, North America Demand Programs, IBM

"Why Fusing Company Identities Can Add Value"
By Jonathan Knowles, Isaac Dinner, and Natalie Mizik, *Harvard Business Review*, September 2011 (HBR Reprint F1109B). **(CP)**

"IBM on a Mission to Save the Planet"
By Ashlee Vance, *BloombergBusinessweek*, March 15, 2012 **(BB)**

March 25 M **Vertical Brand Extensions**

Individual Case Analysis: Diesel for Successful Living
(INSEAD Case 504-007-1) **(CP)**

"Should You Take Your Brand To Where The Action Is?"
By David Aaker, *Harvard Business Review*, Sept.-Oct. 1997, pp. 135-143. **(CP)**

March 27 W **Guest Speaker: Maureen Barry**
SVP/Group Account Director, GSDM

April 1 M **Survey Design**

"The Structure of Survey-Based Brand Metrics,"
By Donald Lehmann, Kevin Lane Keller, and John Farley, *Journal of International Marketing*, No. 4, 2008, 29-56. **(BB)**

Project Due: Team Brand Inventory

April 3 W Brand Line Extensions & Assortment

"Extend Profits, Not Product Lines"
By John A. Quelch and David Kenny, *Harvard Business Review*, Sept.-Oct. 1994, pp.153-160. **(CP)**

"Option Overload: How to Deal with Choice Complexity"
By Dilip Soman, Rotman Magazine, Fall 2010 **(CP)**

"Should You Invest in the Long Tail?"
By Anita Elberse, *Harvard Business Review*, July-August 2008 **(CP)**

April 8 M Managing Brands Over Time

"Managing Brands Over Time"
By Kevin Lane Keller, *Strategic Brand Management*, 4ed, 2013, Chapter 13, pp.449-480. **(CP)**

"Is Nike's Flyknit The Swoosh of the Future?"
By Matt Townsend, *Bloomberg Businessweek*, March 25, 2012 **(BB)**

"PepsiCo Adds Fizz to Its Cola"
By Suzanne Vranica, *Wall Street Journal*, March 29, 2012 **(BB)**

"Retail's New Radical"
By Jennifer Reingold, *Fortune*, March 19, 2012 **(BB)**

"Harley, With Macho Intact, Tries to Court More Women"
By James Hagerty, *Wall Street Journal*, October 31, 2011 **(BB)**

Project Due: Survey

April 10 W Measurement of Brand Equity: Brand Performance and Valuation

Reread "Brand Resonance and the Brand Value Chain"
By Kevin Lane Keller, *Strategic Brand Management*, 4ed, 2013, Chapter 3, pp.100-104. **(CP)**

"Measuring Brand Value"
By Don E. Schultz and Heidi F. Schultz, Chapter 13, *Kellogg on Branding*, ed., Alice M. Tybout and Tim Calkins, John Wiley & Sons, 2005, pp. 260-268 **(CP)**

Interbrand 100 Best Global Brands Methodology **(BB)**

"Measuring the Contributions of Brand to Shareholder Value (and How to Maintain or Increase Them)" By John Gerzema, Ed Lebar, and Anne Rivers, *Journal of Applied Corporate Finance*, 21 (Sept), 2009, 79-88. **(BB)**

Discussion Case: Habitat for Humanity International: Brand Valuation
(Harvard Business School 9-503-101) **(CP) (Skim pp.1-8, Analyze pp.9-14)**

April 15 M **Managing Brands Globally**

"Managing Brands Over Geographic Boundaries and Market Segments"
By Kevin Lane Keller, *Strategic Brand Management*, 4ed, 2013, Chapter 14, pp.481-518. **(CP)**

Individual Case Analysis: Samsung Electronics Company: Global Marketing Operations
Harvard Business School 9-504-051 **(CP)**

"In Europe, Starbucks Adjusts to a Café Culture"
By Liz Alderman, *New York Times*, March 30, 2012 **(BB)**

"Jeep Readies Global Push"
By Jeff Bennett, *Wall Street Journal,* March 29, 2012 **(BB)**

April 17 W **Guest Speaker: Abby Crowder**
District Manager, Target

April 22 M **TBD**

April 24 W **Presentations**

April 26 F **Final Brand Audit Projects Due at 3:00**

April 29 M **Presentations**

May 1 W **Presentations**

APPENDIX A
CASE ANALYSIS & DISCUSSION QUESTIONS

Case Application: Introducing New Coke

Case Application: Assess original Coke's brand equity using Keller's CBBE pyramid. For each dimension, identify associations held by Coke and assess their strength, favorability, and uniqueness.

Case Preparation Questions:

1) What is Coke's brand meaning?
2) What was Coca-Cola's brand building strategy? How did the company build the world's strongest brand?
3) Per Holt's article, do you agree that Coke's brand transforms the consumption experience?
4) What was Pepsi's branding game? Did Coke properly respond to Pepsi Challenge? Was Pepsi truly a threat to Coke?
5) Apply insights from Holt's article to the New Coke case. Why do consumers buy Coca-Cola? How do these motives align with the brand strategy for New Coke?
6) Coca-Cola invested $4 million researching the reformulation question. Keough claimed that "all the time and money and skill poured into consumer research could not measure or reveal the deep and abiding emotional attachment to the original Coca-Cola." Do you agree? What are the implications for practice of brand management?
7) What should we learn from Coca-Cola's mistakes? Identify lessons for effective brand stewardship that can be derived from case.

Case Application: Dove

Case Application: Write 3 positioning statements. The first positioning statement is for Dove in the 1950's. The second positioning statement is for Dove in 2007. The third positioning statement is for yourself. The positioning statements should be in the following format:

Positioning Statement:
Product/Brand
Is *Unique and Most Important Claim*
Among All *Competitive Frame*
For *Target Market*
Because *Support, Reasons Why*

Case Preparation Questions:

1) What is a brand? Why does Unilever want fewer of them?
2) What was Dove's market positioning in the 1950s? What is its positioning in 2007?
3) How did Unilever organize to do product category management and brand management in Unilever before 2000? What was the corresponding structure after 2000?
4) How was brand meaning controlled before 2000? How was it controlled at the time of the case? What are the risks and rewards of its strategy?

Case Analysis: The Ford Fiesta

***Case Decision*:** Critique Ford Fiesta Movement (FFM) social media marketing campaign and determine whether it was superior or inferior marketing communications option to traditional advertising campaign for launching Ford Fiesta in the United States.

1) Utilize frameworks in readings.
   a. Edelman's Consumer Decision Journey ("Branding in Digital Age") to evaluate likely effectiveness at stages in consumer decision process.
   b. Gupta's ("Social Media") Figure 5 of Traditional versus Social Media Approach and Figure 6 of Content that engages customers.
   c. "Profiles of Media Types" and "Which Ad Strategy Is Best For You?"

2) Generate estimates of marketing ROI.
   a. For social media marketing campaign's ROI (e.g., average # of impressions to generate sales lead, # of impressions for key performance outcomes, utilize Hoffman and Fodor's ("Can You Measure ROI of Your Social Media Marketing?") Table as a guide. Factor in costs and state your assumptions.
   b. For traditional advertising ROI calculations, utilize data in "Profiles of Media Types" and "Which Ad Strategy Is Best For You?". Factor in costs and state your assumptions.

Pros and Cons of Alternative Courses of Action for Ford Fiesta campaign:

1) Social Media Marketing
2) Traditional Advertising

<u>Case Preparation Questions:</u>

1) What is Ford Fiesta's brand essence in Europe? US?
2) What is Ford's position in automotive market in Europe? US?
3) What were the objectives of the Ford Fiesta Movement (FFM) campaign?
4) How were FFM agents selected? Critique FFM's agent selection process given brand objectives.
5) How successful was the FFM campaign? What are the right metrics to use?
6) What should be the next marketing communication step?

Case Analysis: Giant Consumer Products

***Case Decision*:** Recommend whether Sanchez should run a national sales promotion and if so, to which of the products should promotion funds be allocated: Dinardo's 32 ounce packages, Dinardo's 16 ounce packages, or Natural Minds.

1) Complete case Exhibit 3 templates (Part 1, 2, and 3) as part of your analyses.
2) Factor in the concerns raised by Capps regarding trade promotions (cannibalization, brand equity erosion, retailer forward buying & pass-through, consumer stockpiling).

Pros and Cons of Alternative Courses of Action for Giant Consumer Products promotion:

1) Dinardo 32-ounce
2) Dinardo 16-ounce
3) Natural Minds

Case Analysis: Diesel

Case Decision: Recommend a brand strategy to achieve StyleLab objectives: sub-brand, endorsement, or independence.

1) Be specific regarding the variant you would recommend in case Exhibit 15.

2) Utilize Aaker's Brand Relationship Spectrum framework (Figure 2 in article) to support your recommendation.

Pros and Cons of Alternative Courses of Action for Diesel:

1) Sub-brand
2) Endorsement
3) Independence

Case Preparation Questions:

1) What are the brand identity and image of Diesel?
2) How important is an element is product in Diesel brand identity? How important an element is advertising in Diesel brand identity?
3) Describe the target market of Diesel.
4) What are the objectives of StyleLab?
5) Evaluate brand strategy using series of questions in Aaker's Brand Relationship Spectrum framework (Figure 2 in article).

Discussion Case: Habitat for Humanity International (Skim pp. 1-8, Analyze pp.9-14)

***Case Decision*:** Evaluate Interbrand's valuation of Habitat for Humanity.

Case Preparation Questions:

1) What are the brand drivers for Habitat for Humanity?
2) Apply the Interbrand methodology to the Habitat brand.
   a. How would you calculate the economic earnings attributable to the brand?
   b. How would you estimate the role of the brand (see Exhibit 14)?
   c. How would you develop the brand strength score, shown here to be 76/100? Critique Habitat for Humanity on Interbrand's 7 Dimensions of Brand Strength.
3) Do you agree with Interbrand's $1.8 Billion valuation of Habitat for Humanity International?

Case Analysis: Samsung

***Case Decision*:** Recommend whether Kim should follow a standardized "one-size fits all" or customization global branding approach to propel Samsung into the premier league of global brands. Utilize extensive market research (Exhibits 10-15) to make your recommendation.

Pros and Cons of Alternative Courses of Action for Samsung Global Branding:

1) Standardized "One-Size Fits All" Global Brand
2) Customized Global Brand (customized by country, regions, segments, or culture)

Case Preparation Questions:

1) What are the ingredients for Samsung corporate turnaround? Implications for marketing?
2) How strong is the Samsung brand? Can Samsung pass Sony and become a top ten global brand?
3) What does the market research indicate about Samsung's consumer relationships? How does it vary by country?
4) What is Samsung's brand equity relative to its competitors? How does this vary by country?
5) What does the Samsung brand need to do to be relevant for consumer trends?

APPENDIX B

CASE ANALYSIS FORMAT (40 points)

PAGE 1: *(single spaced, 12-point font, 1" margins)*

1) ***Decision Recommendation****: 1-2 sentences* ***(4 points)***

2) ***Rationale:*** Detailed justification (2-3 paragraphs) for recommended option drawing on Page 2 appendix supporting evidence & analyses. **(18 points)**

PAGE 2: Appendix

1) Alternative Courses of Action: Pros and Cons (10 points)

Options	***Pros***	***Cons***
State Option A	• *Pro 1* • Pro 2 • Pro 3	• *Con 1* • Con 2 • Con 3
State Option B	• *Pro 1* • Pro 2 • Pro 3	• *Pro 1* • Pro 2 • Pro 3

2) ***Supporting Evidence and Analyses (8 points)***

APPENDIX C

Honor Code Purpose

Academic honor, trust and integrity are fundamental to The University of Texas at Austin McCombs School of Business community. They contribute directly to the quality of your education and reach far beyond the campus to your overall standing within the business community. The University of Texas at Austin McCombs School of Business Honor System promotes academic honor, trust and integrity throughout the Graduate School of Business. The Honor System relies upon The University of Texas Student Standards of Conduct (Chapter 11 of the Institutional Rules on Student Service and Activities) for enforcement, but promotes ideals that are higher than merely enforceable standards. Every student is responsible for understanding and abiding by the provisions of the Honor System and the University of Texas Student Standards of Conduct. The University expects all students to obey the law, show respect for other members of the university community, perform contractual obligations, maintain absolute integrity and the highest standard of individual honor in scholastic work, and observe the highest standards of conduct. Ignorance of the Honor System or The University of Texas Student Standards of Conduct is not an acceptable excuse for violations under any circumstances.

The effectiveness of the Honor System results solely from the wholehearted and uncompromising support of each member of the Graduate School of Business community. Each member must abide by the Honor System and must be intolerant of any violations. The system is only as effective as you make it.

Faculty Involvement in the Honor System

The University of Texas at Austin McCombs School of Business Faculty's commitment to the Honor System is critical to its success. It is imperative that faculty make their expectations clear to all students. They must also respond to accusations of cheating or other misconduct by students in a timely, discrete and fair manner. We urge faculty members to promote awareness of the importance of integrity through in-class discussions and assignments throughout the semester.

Expectations Under the Honor System

Standards

If a student is uncertain about the standards of conduct in a particular setting, he or she should ask the relevant faculty member for clarification to ensure his or her conduct falls within the expected scope of honor, trust and integrity as promoted by the Honor System. This applies to all tests, papers and group and individual work. Questions about appropriate behavior during the job search should be addressed to a professional member of the Career Services Office. Below are some of the specific examples of violations of the Honor System.

Lying

Lying is any deliberate attempt to deceive another by stating an untruth, or by any direct form of communication to include the telling of a partial truth. Lying includes the use or omission of any information with the intent to deceive or mislead. Examples of lying include, but are not limited to, providing a false excuse for why a test was missed or presenting false information to a recruiter.

Stealing

Stealing is wrongfully taking, obtaining, withholding, defacing or destroying any person's money, personal property, article or service, under any circumstances. Examples of stealing include, but are not limited to, removing course material from the library or hiding it from others, removing material from another person's mail folder, securing for one's self unattended items such as calculators, books, book bags or other personal property. Another form of stealing is the duplication of copyrighted material beyond the reasonable bounds of "fair use." Defacing (e.g., "marking up" or highlighting) library books is also considered stealing, because, through a willful act, the value of another's property is decreased. (See the appendix for a detailed explanation of "fair use.")

Cheating

Cheating is wrongfully and unfairly acting out of self-interest for personal gain by seeking or accepting an unauthorized advantage over one's peers. Examples include, but are not limited to, obtaining questions or answers to tests or quizzes, and getting assistance on case write-ups or other projects beyond what is authorized by the assigning instructor. It is also cheating to accept the benefit(s) of another person's theft(s) even if not actively sought. For instance, if one continues to be attentive to an overhead conversation about a test or case write-up even if initial exposure to such information was accidental and beyond the control of the student in question, one is also cheating. If a student overhears a conversation or any information that any faculty member might reasonably wish to withhold from the student, the student should inform the faculty member(s) of the information and circumstance under which it was overheard.

Actions Required for Responding to Suspected and Known Violations

As stated, everyone must abide by the Honor System and be intolerant of violations. If you suspect a violation has occurred, you should first speak to the suspected violator in an attempt to determine if an infraction has taken place. If, after doing so, you still believe that a violation has occurred, you must tell the suspected violator that he or she must report himself or herself to the course professor or Associate Dean of the Graduate School of Business. If the individual fails to report himself or herself within 48 hours, it then becomes your obligation to report the infraction to the course professor or the Associate Dean of the Graduate School of Business. Remember that although you are not required by regulation to take any action, our Honor System is only as effective as you make it. If you remain silent when you suspect or know of a violation, you are approving of such dishonorable conduct as the community standard. You are thereby precipitating a repetition of such violations.

The Honor Pledge

The University of Texas at Austin McCombs School of Business requires each enrolled student to adopt the Honor System. The Honor Pledge best describes the conduct promoted by the Honor System. It is as follows:

"I affirm that I belong to the honorable community of The University of Texas at Austin Graduate School of Business. I will not lie, cheat or steal, nor will I tolerate those who do."

"I pledge my full support to the Honor System. I agree to be bound at all times by the Honor System and understand that any violation may result in my dismissal from the Graduate School of Business."

The following pages provide specific guidance about the Standard of Academic Integrity at the University of Texas at Austin. Please read it carefully and feel free to ask me any questions you might have.

Excerpts from the University of Texas at Austin Office of the Dean of Students website
(http://deanofstudents.utexas.edu/sjs/acint_student.php)

The Standard of Academic Integrity

A fundamental principle for any educational institution, academic integrity is highly valued and seriously regarded at The University of Texas at Austin, as emphasized in the standards of conduct. More specifically, you and other students are expected to "maintain absolute integrity and a high standard of individual honor in scholastic work" undertaken at the University (Sec. 11-801, *Institutional Rules on Student Services and Activities*). This is a very basic expectation that is further reinforced by the University's Honor Code. At a minimum, you should complete any assignments, exams, and other scholastic endeavors with the utmost honesty, which requires you to:

- acknowledge the contributions of other sources to your scholastic efforts;
- complete your assignments independently unless expressly authorized to seek or obtain assistance in preparing them;
- follow instructions for assignments and exams, and observe the standards of your academic discipline; and
- avoid engaging in any form of academic dishonesty on behalf of yourself or another student.

For the official policies on academic integrity and scholastic dishonesty, please refer to Chapter 11 of the *Institutional Rules on Student Services and Activities*.

What is Scholastic Dishonesty?

In promoting a high standard of academic integrity, the University broadly defines scholastic dishonesty—basically, all conduct that violates this standard, including *any act designed to give an unfair or undeserved academic advantage*, such as:

- Cheating
- Plagiarism
- Unauthorized Collaboration
- Collusion
- Falsifying Academic Records
- Misrepresenting Facts (e.g., providing false information to postpone an exam, obtain an extended deadline for an assignment, or even gain an unearned financial benefit)
- Any other acts (or attempted acts) that violate the basic standard of academic integrity (e.g., multiple submissions—submitting essentially the same written assignment for two courses without authorization to do so)

Several types of scholastic dishonesty—unauthorized collaboration, plagiarism, and multiple submissions—are discussed in more detail on this Web site to correct common misperceptions about these particular offenses and suggest ways to avoid committing them.

For the University's official definition of scholastic dishonesty, see Section 11-802, *Institutional Rules on Student Services and Activities*.

Unauthorized Collaboration

If you work with another person on an assignment for credit *without the instructor's permission to do so*, you are engaging in unauthorized collaboration.

- This common form of academic dishonesty can occur with all types of scholastic work—papers, homework, tests (take-home or in-class), lab reports, computer programming projects, or any other assignments to be submitted for credit.

- For the University's official definitions of unauthorized collaboration and the related offense of collusion, see Sections 11-802(c)(6) & 11-802(e), *Institutional Rules on Student Services and Activities*.

Some students mistakenly assume that they can work together on an assignment as long as the instructor has not expressly prohibited collaborative efforts.

- Actually, students are expected to complete assignments independently unless the course instructor indicates otherwise. So working together on assignments is *not* permitted unless the instructor specifically approves of any such collaboration.

Unfortunately, students who engage in unauthorized collaboration tend to justify doing so through various rationalizations. For example, some argue that they contributed to the work, and others maintain that working together on an assignment "helped them learn better."

- The instructor—not the student—determines the purpose of a particular assignment *and* the acceptable method for completing it. Unless working together on an assignment has been specifically authorized, always assume it is not allowed.
- Many educators do value group assignments and other collaborative efforts, recognizing their potential for developing and enhancing specific learning skills. And course requirements in some classes do consist primarily of group assignments. But the expectation of individual work is the prevailing norm in many classes, consistent with the presumption of original work that remains a fundamental tenet of scholarship in the American educational system.

Some students incorrectly assume that the degree of any permissible collaboration is basically the same for all classes.

- The extent of any permissible collaboration can vary widely from one class to the next, even from one project to the next within the same class.
- Be sure to distinguish between collaboration that is authorized for a particular assignment *and* unauthorized collaboration that is undertaken for the sake of expedience or convenience to benefit you and/or another student. By failing to make this key distinction, you are much more likely to engage in unauthorized collaboration. To avoid any such outcome, always seek clarification from the instructor.

Unauthorized collaboration can also occur in conjunction with group projects.

- How so? If the degree or type of collaboration exceeds the parameters expressly approved by the instructor. An instructor may allow (or even expect) students to work together on one stage of a group project but require independent work on other phases. Any such distinctions should be strictly observed.

Providing another student unauthorized assistance on an assignment is also a violation, even without the prospect of benefiting yourself.

- If an instructor did not authorize students to work together on a particular assignment *and* you help a student complete that assignment, you are providing unauthorized assistance and, in effect, facilitating an act of academic dishonesty. Equally important, you can be held accountable for doing so.
- For similar reasons, you should not allow another student access to your drafted or completed assignments unless the instructor has permitted those materials to be shared in that manner.

Plagiarism

Plagiarism is another serious violation of academic integrity. In simplest terms, this occurs if you represent *as your own work* any material that was obtained from another source, regardless how or where you acquired it.

- Plagiarism can occur with *all* types of media—scholarly or non-academic, published or unpublished—written publications, Internet sources, oral presentations, illustrations, computer code, scientific data or analyses, music, art, and other forms of expression. (See Section 11-802(d) of the *Institutional Rules on Student Services and Activities* for the University's official definition of plagiarism.)

- Borrowed material from written works can include entire papers, one or more paragraphs, single phrases, or any other excerpts from a variety of sources such as books, journal articles, magazines, downloaded Internet documents, purchased papers from commercial writing services, papers obtained from other students (including homework assignments), etc.
- As a general rule, the use of any borrowed material results in plagiarism if the original source is not properly acknowledged. So you can be held accountable for plagiarizing material in either a final submission of an assignment *or* a draft that is being submitted to an instructor for review, comments, and/or approval.

Using *verbatim* material (e.g., exact words) without proper attribution (or credit) constitutes the most blatant form of plagiarism. However, other types of material can be plagiarized as well, such as *ideas* drawn from an original source or even its *structure* (e.g., sentence construction or line of argument).

- Improper or insufficient paraphrasing often accounts for this type of plagiarism. (See additional information on paraphrasing.)

Plagiarism can be committed intentionally *or* unintentionally.

- Strictly speaking, any use of material from another source without proper attribution constitutes plagiarism, regardless why that occurred, and any such conduct violates accepted standards of academic integrity.
- Some students deliberately plagiarize, often rationalizing this misconduct with a variety of excuses: falling behind and succumbing to the pressures of meeting deadlines; feeling overworked and wishing to reduce their workloads; compensating for actual (or perceived) academic or language deficiencies; and/or justifying plagiarism on other grounds.
- But some students commit plagiarism without intending to do so, often stumbling into negligent plagiarism as a result of sloppy notetaking, insufficient paraphrasing, and/or ineffective proofreading. Those problems, however, neither justify nor excuse this breach of academic standards. By misunderstanding the meaning of plagiarism and/or failing to cite sources accurately, you are much more likely to commit this violation. Avoiding that outcome requires, at a minimum, a clear understanding of plagiarism *and* the appropriate techniques for scholarly attribution. (See related information on paraphrasing; notetaking and proofreading; and acknowledging and citing sources.)

By merely changing a few words or rearranging several words or sentences, you are *not* paraphrasing. Making minor revisions to borrowed text amounts to plagiarism.

- Even if properly cited, a "paraphrase" that is too similar to the original source's wording and/or structure is, in fact, plagiarized. (See additional information on paraphrasing.)

Remember, your instructors should be able to clearly identify which materials (e.g., words and ideas) are your own *and* which originated with other sources.

- That cannot be accomplished without proper attribution. You must give credit where it is due, acknowledging the sources of any borrowed passages, ideas, or other types of materials, and enclosing any verbatim excerpts with quotation marks (using block indentation for longer passages).

Plagiarism & Unauthorized Collaboration

Plagiarism **and** unauthorized collaboration **are often committed jointly.**

By submitting *as your own work* any unattributed material that you obtained from other sources (including the contributions of another student who assisted you in preparing a homework assignment), you have committed plagiarism. And if the instructor did not authorize students to work together on the assignment, you have also engaged in unauthorized collaboration. Both violations contribute to the same fundamental deception—representing material obtained from another source as your own work.

Group efforts that extend beyond the limits approved by an instructor frequently involve plagiarism in addition to unauthorized collaboration. For example, an instructor may allow students to work together while researching a subject, but require each student to write a separate report. If the students collaborate while writing their reports *and* then submit the products of those joint efforts as individual works, they are guilty of unauthorized collaboration as well as plagiarism. In other words, the students collaborated on the written assignment without authorization to do so, and also failed to acknowledge the other students' contributions to their own individual reports.

Multiple Submissions

Submitting the same paper (or other type of assignment) for two courses *without prior approval* represents another form of academic dishonesty.

You may not submit a substantially similar paper or project for credit in two (or more) courses unless expressly authorized to do so by your instructor(s). (See Section 11-802(b) of the *Institutional Rules on Student Services and Activities* for the University's official definition of scholastic dishonesty.)

You may, however, re-work or supplement previous work on a topic with the instructor's approval.

Some students mistakenly assume that they are entitled to submit the same paper (or other assignment) for two (or more) classes simply because they authored the original work.

Unfortunately, students with this viewpoint tend to overlook the relevant ethical and academic issues, focusing instead on their own "authorship" of the original material and personal interest in receiving essentially double credit for a single effort.

Unauthorized multiple submissions are inherently deceptive. After all, an instructor reasonably assumes that any completed assignments being submitted for credit were actually prepared for that course. Mindful of that assumption, students who "recycle" their own papers from one course to another make an effort to convey that impression. For instance, a student may revise the original title page or imply through some other means that he or she wrote the paper for that particular course, sometimes to the extent of discussing a "proposed" paper topic with the instructor or presenting a "draft" of the paper before submitting the "recycled" work for credit.

The issue of plagiarism is also relevant. If, for example, you previously prepared a paper for one course and then submit it for credit in another course without citing the initial work, you are committing plagiarism—essentially "self-plagiarism"—the term used by some institutions. Recall the broad scope of plagiarism: all types of materials can be plagiarized, including unpublished works, even papers you previously wrote.

Another problem concerns the resulting "unfair academic advantage" that is specifically referenced in the University's definition of scholastic dishonesty. If you submit a paper for one course that you prepared and submitted for another class, you are simply better situated to devote more time and energy toward fulfilling other requirements for the subsequent course than would be available to classmates who are completing all course requirements during that semester. In effect, you would be gaining an unfair academic advantage, which constitutes academic dishonesty as it is defined on this campus.

Some students, of course, do recognize one or more of these ethical issues, but still refrain from citing their authorship of prior papers to avoid earning reduced (or zero) credit for the same works in other classes. That underlying motivation further illustrates the deceptive nature of unauthorized multiple submissions.

An additional issue concerns the problematic minimal efforts involved in "recycling" papers (or other prepared assignments). Exerting minimal effort basically undercuts the curricular objectives associated with a particular assignment and the course itself. Likewise, the practice of "recycling" papers subverts important learning goals for individual degree programs and higher education in general, such as the mastery of specific skills that students should acquire and develop in preparing written assignments. This demanding but necessary process is somewhat analogous to the required regimen of athletes, like the numerous laps and other repetitive training exercises that runners must successfully complete to prepare adequately for a marathon.