Integrating Service-Learning in Marketing Classes at the Graduate and Undergraduate Levels

Michael Russell, St. Bonaventure University

This paper is designed to provide teachers with examples of integrating service learning in marketing classes at the undergraduate and graduate levels. Two courses are selected to illustrate how service learning can enhance the learning experience for students and gain community support for the program. At the undergraduate level, an elective in marketing, Event and Sponsorship Marketing, was selected. At the graduate level, a required class, Marketing Management, was selected. Service learning, a pedagogical approach that combines rigorous classroom content and theory with experiential application through civic engagement is an effort to address concerns raised regarding the lack of personal and corporate responsibility by college graduates. The paper also addresses ways service learning can be used in other classes in the marketing curriculum. The response of students to their service-learning experience is also examined.

BACKGROUND

Service-learning (SL) is becoming increasingly important in the business curriculum, especially for institutions that highlight the importance of service in their mission statements. In an increasing number of institutions, SL and community service is an integral part of the curriculum. Although there is no single definition for SL, several definitions are commonly used:

“An academically rigorous instructional method that incorporates meaningful community service into the curriculum...Service-
learning involves students in organized community service that addresses local needs, while developing their academic skills, respect for others and commitment to the common good” (AACSB Report, 2005).

“A form of experiential education in which students engage in activities that address human and community needs together with structured opportunities intentionally designed to promote student learning and development; service-learning combines service objectives with the intent that the activity change both the recipient and the provider of the service.” (Jacoby 1996, p.5).

“A pedagogical process whereby students participate in course-relevant community service to enhance their learning experience” (Petkus 2000, p.64)

There are three advantages of SL over internships, part-time jobs, or the use of case studies in the classroom. First, compared to the case method, students are in the field and must find and identify the data for decision making and action instead of having the information packaged (Berry and Taylor 2006). A second advantage is SL encourages students to do things with rather than for others (Jacoby 2003). Finally, SL offers the opportunity for reflection which intensifies the learning experience for students (Munter 2002). The student reflections can be both academic and personal. (Berry and Workman 2007).

SL experiences can be very effective when undertaken in the marketing discipline because marketing tools are required by all organizations, whether the goal is to sell a product, a service, a cause, or an idea (Easterling and Rudell 1997). Given the universal application of marketing tools and techniques, SL is an excellent opportunity for students to test theories in a realistic setting. Further, because many organizations lack the required resources to implement marketing tools (research, advertising, sales forecasting, new product development, etc.), SL becomes a benefit that institutions can offer their local stakeholders.
**METHODOLOGY**

Two courses were selected to integrate service learning. At the undergraduate level, an elective in marketing, Event and Sponsorship Marketing, was selected. At the graduate level, a required class, Marketing Management, was selected.

**A. Event and Sponsorship Marketing (Marketing 310)**

The Event and Sponsorship Marketing class was offered for the first time in the fall semester, 2006. It was offered a second time in the fall semester, 2007. A syllabus is included in Appendix A.

The major objective of the course was to expose students to creating and running an event. In addition, students were required to obtain as many sponsors as they could for the event they created. Students worked in teams selected at the beginning of the semester. Teams were formed by having each undergraduate student interview with a panel of graduate students. At the end of the interviews, the graduate students selected the team of undergraduate students that they would work with during the semester. In preparation for the interviews, the undergraduate students submitted resumes and prepared for questioning that was designed to determine if they would be a valuable group member for a project of this type. In 2006, 4 graduate students served as the panel of interviewers and selected team members. In 2007, 7 graduate students served as the panel of interviewers and selected team members. Therefore, there were 4 teams in 2006 and 7 teams in 2007.

The selection of team members was made by allowing each graduate student a first pick, second pick, etc. until all the students were selected. The intent of this process was to allow each team to be equally balanced with talent. The interviews lasted approximately 5 minutes each and took place during a regularly scheduled class period. Since the graduate students also took the class for graduate credit and would be graded, in part, on the performance of the team they managed, it was in their interest to choose wisely. In fact, the graduate students took great care in the
selection process. Since the graduate students were receiving graduate credit, they were assigned a variety of additional tasks that are outlined in the discussion below.

As noted in the syllabus, the class consisted of several interrelated activities. First, the students were required to create and run an event of their choosing. Although not required, the students were encouraged to select events that would generate proceeds for not-for-profit organizations. In the two years this class was offered, the students created the following events:

<table>
<thead>
<tr>
<th>Event</th>
<th>Proceeds of Event</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>2006</strong></td>
<td></td>
</tr>
<tr>
<td>Free Youth Hockey Clinic</td>
<td>Youth Hockey League of Olean, NY</td>
</tr>
<tr>
<td>Christmas Ornament Sale</td>
<td>United Way of Olean, NY</td>
</tr>
<tr>
<td>UNICEF Fundraiser</td>
<td>UNICEF</td>
</tr>
<tr>
<td>Wine Tasting and Etiquette</td>
<td>Graduate students</td>
</tr>
<tr>
<td><strong>2007</strong></td>
<td></td>
</tr>
<tr>
<td>Student/Faculty Golf Charity Tournament</td>
<td>Bona Responds</td>
</tr>
<tr>
<td>Walk for Warmth</td>
<td>Warming House</td>
</tr>
<tr>
<td>Chicken Wing Championship of Olean</td>
<td>Bona Responds</td>
</tr>
<tr>
<td>Shop for a Cause</td>
<td>Literacy Volunteers</td>
</tr>
<tr>
<td>Christmas Party</td>
<td>Bona Buddies</td>
</tr>
<tr>
<td>Powder Puff Flag Football Tournament</td>
<td>Players</td>
</tr>
<tr>
<td>Senior Breakfast at Sprague’s Maple Farm</td>
<td>Seniors</td>
</tr>
</tbody>
</table>

The various events raised nearly $8,000 for local charities and generated more than 125 sponsors. As noted earlier, the students worked closely with the organizations that received the proceeds of the event sponsored. In addition, the local media in the surrounding area featured stories for many of the events. The publicity effort was handled by the
individual teams. Many of the team members had never developed press releases or dealt with the communications office on campus.

In addition to creating and running an event, the students were also responsible for writing a term paper on a topic related to “event marketing” or “sponsorship marketing.” A sample of the paper titles is presented in Appendix B. Every student was also required to interview an executive who was responsible for running an event and report their findings to the class. The presentations were made at the end of the semester and highlighted many of the lessons the students had learned first-hand during the semester.

The graduate students, in addition to coordinating the efforts of their team, were required to organize a class activity that would expose the entire class to aspects of event and sponsorship marketing. The activities varied from having guest speakers come to class to share their experiences of running events; to actually having students attend an event and having the person coordinating the event speak with the students attending regarding key issues they faced. Examples of the events coordinated by graduate students are included in Appendix C.

**B. Marketing Management (MBA 612)**

Marketing Management is a required graduate class offered in the MBA program. A syllabus is presented in Appendix D. Students enrolled in the fall, 2008 semester were required to develop a marketing plan for client. As indicated in the syllabus, the students were strongly encouraged, not required, to select a not-for-profit organization as a client.

The reasons for encouraging students to select a not-for-profit included the following:

1. Most not-for-profit organizations are relatively small in size. As a result, students are able to interact with senior management and obtain information that is sometimes difficult to obtain from larger organizations.

2. Not-for-profit organizations are often in need of marketing advice but lack the resources to obtain it. As a result, the clients tend to be very appreciative of the efforts made by students.
3. A central mission for our school is related to providing service to those in greatest need. Therefore, the projects completed for not-for-profit organizations are closely related to, and support our mission.

In the fall, 2008, there were 10 teams formed in the class. Five of the teams chose to develop a marketing plan for a not-for-profit. The organizations selected included the following:

- Olean YMCA
- Southern Tier Catholic School
- Archbishop Walsh High School
- Total Senior Care
- Olean Senior Center

**Findings and Conclusions**

Students and clients were generally pleased with the outcome for the various events and marketing plans. The comments of a leader of an organization for the Event and Sponsorship class were typical for the not-for-profit organizations served:

I want to extend a warm greeting and a heart full of gratitude to all of you. The first ever 5K Run/Walk for Warmth was a success! I am honored and blessed that you chose to make the Warming House the place of benefit for your Marketing project this semester. It served as a great awareness builder on our campus and a fundraiser to support our mission of serving “community, dignity, and nourishment” to the hungry and lonely of the Olean area. It also ended up being quite fun!

The students in the Event and Sponsorship class also expressed several comments which indicated that they were satisfied with the event they developed:

We could have chosen any charity to donate the money to, but we decided to give it back to our own community—and what better place than the Warming House?
Overall, we learned how hard it is to run a simple event as a Christmas party for 250 children. We were scrambling right up until the event took place, with sponsorship checks and finding basketballs to run the relay races. The problem is that you never know what to expect until the event is over. The reason we were successful was that our event was not just for the class, but also for the Bona Buddies who needed to have a good Christmas party. It paid off at the event. You just knew the kids had fun, which makes it a successful event for the group.

After obtaining the sponsors, it was rewarding to bring the community together and get them excited about donating to a worthwhile charity. We also learned how to think as a team and respect each others’ opinions. Our primary goal was to raise awareness for Bona Responds and raise funds for the organization. Everyone had fun at the event. We heard many positive comments from participants.

We learned that many residents in the area have not had the opportunities we did in obtaining an education. We felt that this event was a chance to promote Literacy Volunteers and to assist people in the community who are seeking literacy assistance and education. In addition, the event itself was fun and we met many people we might otherwise never have met.

The clients in the Marketing Management class also expressed their satisfaction with the final marketing plans created by the students:

This was a well organized marketing plan. Well written and a great wealth of information. I would like to provide a copy to our board president at the next meeting.

I was impressed that the team was able to see beyond our Medicare and Medicaid clients and realize the potential of the private pay market. They left us with concrete suggestions on which we can build. We found their marketing effectiveness report to be very valuable and we intend to adopt a report that will be very similar to their recommendations.

The presentation was well defined and succinct. The team members successfully used the information we provided and their own
research to incorporate new ideas and comparisons into the project. This project will truly enhance and provide a starting point for the Southern Tier Catholic Development office.

The students did an outstanding job. They made an effort to learn about the Senior Center by volunteering here on several occasions to find out what we are all about and our clientele. They were received very well by the senior citizens we serve. We look forward to implementing their suggestions. This was very rewarding for our organization.

In order to measure the response of clients, a rubric was developed and implemented at the end of the course. In MBA 612, the rubric is provided in Appendix E. In all of the categories listed in the rubric, the clients rated the students with marks of 8 or higher (excellent to superior). As indicated earlier, the comments from the clients were very favorable. In addition to obtaining responses from the clients, the students who developed marketing plans for not-for-profit organizations were also surveyed after completing the course to determine their satisfaction with preparing a marketing plan for a not-for-profit organization. Although the response rate was limited, the responses obtained indicated that the students were pleased to know their work was valued by the client and would be used. In the undergraduate class, a rubric was also developed and implemented at the end of the course. Each student in the class was asked to develop responses to the following items:

- Description of the event—Be very specific
- Why this event was chosen by the team
- Number of people attending the event
- Number of sponsors
- Accurate accounting of all revenues and expenses
- Copy of thank you letters sent to sponsors and, if applicable, participants
- Lessons learned, both positive and negative, from running the event
- Suggestions to improve the event if held again
The student responses reflected that they learned a great deal from running the events and were especially proud that there work benefited people in need. As indicated earlier, the clients were especially thankful for the support of the students.

In summary, students in both classes realized the importance of serving those in need. In addition, they were able to apply marketing theories and concepts in a real environment and obtain feedback from clients. Students described the benefits of working in a team environment and learning to manage their time and resources wisely. The courses also helped the School of Business gain publicity for their programs in community and communicate the mission statement to a broad audience.

The use of SL can be easily expanded to classes such as advertising and marketing research. In addition, there are a number of electives in the marketing curriculum that can be tailored to use SL to enhance learning while fulfilling the mission of the school.

REFERENCES


APPENDIX A

SYLLABUS

**Event and Sponsorship Marketing—Marketing 310**

**Syllabus—Fall, 2007**

**General Information:**

*Instructor:* Chairman, Marketing Department

*Office:* Murphy 243  
*Email*

*Telephone:* Office: 375-2097  
Cell: 474-6079  
Home: 373-4205

*Office Hours:*

- Monday 1:00 p.m.–5:00 p.m.
- Tuesday 2:00 p.m.–3:00 p.m.
- Thursday 2:00 p.m.–3:00 p.m.

**Class Schedule:**

- Marketing Management (MBA 612)  
  Murphy 105-Monday, 6 p.m.–8:45 p.m.
- Event and Sponsorship Marketing (MKT 310)  
  Murphy 107-TTH, 11:30 a.m.–12:45 p.m.
- Skills for the Good Journey (UNIV 101)  
  Plassmann 157-TTH, 10 a.m.–10:50 a.m.
- Skills for the Good Journey (UNIV 101)  
  Plassmann 157-TTH, 1 p.m.–1:50 p.m.
I strongly encourage you to meet with me before and after the class sessions, and communicate by e-mail during the semester in order to clarify issues or answer any questions that you might have.

**Course Objectives:**
The basic objective of this course is to provide students with broad insights in the managerial decision-making involved in the development, planning, and implementation of events supported by sponsorships for various enterprises. The course is also designed to enhance student skills in the following areas: written and verbal communication; organization and planning; time management, and interpersonal/team work. Program goals are listed at http://ms.sbu.edu/program_learning_goals.htm

**Catalog Description:**
**MKT 310. Event and Sponsorship Marketing**
This course investigates two interrelated topics: Event Marketing and Sponsorships. The first half of the course focuses attention on event marketing including event planning, generating revenue and strategic partnerships. The second half of the course focuses on sponsorship marketing including measuring sponsorship’s effectiveness, selling sponsorships, and understanding the interrelationships between advertising, sponsorships and celebrity endorsers. In addition, “naturally occurring events” such as the Super Bowl and Olympics will provide case study material for discussion. Prerequisite: MKT 301. 3 credits.

**Course Description:**
This course is designed to introduce you to the role of event marketing and sponsorships as tools to build brand equity for a variety of companies and organizations. The class is designed to examine topics each week tailored to the needs of student projects.

Each student will combine his/her talents with those of other students to form an advertising team under the direction of a graduate student.
The team will demonstrate the ability to manage an event approved by the instructor that will include the use of sponsorships. Specific details of the assignment will be made in class.

**Required Readings**
Wall Street Journal
Articles as assigned

**Basis for Evaluation and Final Grade:**
- Event Management with Sponsorships (Group) 500
- Term Paper-Current Issues in Event and Sponsorship Marketing (Individual) 250
- Event Manager Interview and Report (Individual) 200
- Class participation/attendance (Individual) 50
- Total Possible Points 1,000

The actual grade you earn will be determined as follows:
- A = 95% A- = 90% B+ = 87% B = 83% B- = 80% C+ = 77%
- C = 73% C- = 70% D+ = 67% D = 63% D- = 60% F = Below 60%

**Event Management with Sponsorships (50% or 500 possible points)**
Working together with other students and guided by a graduate student, you will manage an event approved by the instructor. Specific details of the assignment will be provided in class. The quality, level of participation and sponsorship support will be key determinants in assigning a grade for this project.

**Term Paper-The Role of Event and Sponsorship Marketing**
This individually prepared paper should show evidence of scholarly research by the student. The specific topic developed will be done in
consultation with the instructor. The final 15-page (maximum) paper should contain evidence (bibliographic) that the topic has been thoroughly researched and provides a variety of insights. Personal interviews are strongly encouraged.

**Event Manager Interview and Report (20% or 200 possible points)**
Students will interview an executive responsible for event management or obtaining sponsorships and make a presentation of the major findings to the class. This presentation should synthesize your readings and discussions by illustrating how the executive uses/or does not use marketing theories in the marketplace. The written report should be 5 pages or less using questions developed in class and augmented by you. The oral report should last approximately 10-15 minutes. (Please note that there will be no duplication of executives selected for interviews...selection and approval will be made on a first-come, first served basis)

**Class Participation/Attendance (5% or 50 Possible Points)**

**Class Participation**
Your participation in class discussions is an important part of this class. Ask questions, share your observations about the topic being discussed, and contribute to the discussion with examples. You can participate effectively if you are constantly informed by the business press including *Business Week*, *Fortune*, *WSJ* and the *Harvard Business Review*. Your preparation and contribution to class will be evaluated by the instructor.

- Please participate. What you put into the class will determine what you get out of it—and what others get out of it.
- Develop confidence in participating. Some people have good ideas or questions but are hesitant to speak up. Good ideas are lost if they are not shared. And if you have a question it is likely that others will as well. If you are not confident about participating, seize this opportunity to develop in that area.
Please keep up with the assignments. It will make the class more interesting, and more valuable to you.

I want this course to be a good experience for you. If you have criticisms of the course, the material, or my teaching methodology, I hope you will let me know. Remember, this is not a lecture-based class. This class is structured as a seminar.

**Attendance Policy**
You are expected to attend every class for the entire class meeting. If you have a legitimate excuse for not attending a class, please inform the instructor. Poor attendance will be cause for a significant reduction in your final grade.

**Academic Honesty Policy**
I am committed to St. Bonaventure University’s academic environment for students, supporting and rewarding only the highest standards of ethical behavior. Academic dishonesty, in any form, will not be tolerated. Please consult the St. Bonaventure University Handbook for a list of unacceptable practices, penalties to be assigned and procedures to be followed in prosecuting cases of alleged academic dishonesty. Further, the St. Bonaventure University Undergraduate Catalog may be consulted for specific details on all academic policies at St. Bonaventure University.

**Students With Disabilities**
Students with disabilities who believe they may need special accommodations in this class are encouraged to contact the Disability Support Services Office (375-2065) in Doyle Hall (Room 26) to make arrangements.

**Courtesy**
One conversation please!
Turn off cell phones!! Arrive on time!!!
Tentative Outline

Class Meeting(s)  Topic Area

This section is determined as the semester progresses. Topical areas include speakers, field trips arranged by graduate students and instructor, student presentations and group meetings.

APPENDIX B

SAMPLE RESEARCH PAPER TOPICS

- The Use of Sponsorships in Collegiate Bowls
- Growth of Sponsorships in Major League Baseball
- The Role of Sponsorships for Public Utilities
- Olympic Sponsorships-Are They Worth the Price?
- The Use of Sponsorships in the Armed Forces
- The Use of Sponsorships and Event Planning in the Tourism Industry
- Sponsorships and NASCAR
- The Growth of Sponsorships in the NBA
- The Growth of Sponsorships in Concerts
- The Growth of Sponsorships in Skateboarding

APPENDIX C

CLASS ACTIVITIES DEVELOPED BY GRADUATE STUDENTS

- Attend the Garlic Festival in Cuba, NY
- Visit the Allegany Casino/Marketing Manager Presentation
- Zippo field trip and seminar with marketing manager
- NYS Lottery – Class speaker
- American Cancer Society-Class speaker
- CUTCO-Field trip and seminar with marketing managers
- Haunted Hay Ride-field trip and speaker
- Pumkinville-field trip and speaker
SYLLABUS

Marketing Management—MBA 612
Course Syllabus
Fall Semester, 2008

General Information:
Instructor: Professor and Chairman, Marketing Department
Office: Murphy 243
Telephone: Office: 375-2097 Cell: 474-6079
Office Hours: Tuesday 9:30–11:30 a.m.
Tuesday 1:30–3:30 p.m.
Thursday 1:30–5 p.m.

Class Schedule:

- Marketing Management (MBA 612)
  Murphy 105-Thursday, 6 p.m.–8:45 p.m.
- Marketing Management (MBA 612)
  Buffalo Center, August 22–September 27
  Friday, 6–9 p.m. Saturday, 9 a.m.–2:30 p.m.
- Marketing Research, Marketing 402
  Plassmann 161-Tuesday/Thursday 11:30 a.m.–12:45 p.m.

I strongly encourage you to meet with me before and after the class sessions, and communicate by e-mail during the semester in order to clarify issues or answer any questions that you might have. If you plan to meet during my office hours, please let me know in advance so I can set aside time for you.

Course Objectives
Marketing management is a critical business function that guides organizations (large and small, private and public, profit and non-profit, industrial and consumer) in identifying, selecting and servicing their markets. The first objective of this course is to introduce students to substantive
theories and concepts of marketing management. The second objective is to develop skills in marketing analysis and decision-making, by providing practice in assessing and solving complex marketing problems. For specific program goals, see the following site: http://ms.sbu.edu/program_learning_goals.htm

Textbooks and Required Readings
  Authors: Philip Kotler and Kevin Lane Keller
- *StratSim Marketing*, Interpretive Software, 2008
- *Wall Street Journal*

Course Requirements and Grading:
- Marketing Plan 20%
- Case Simulation 20%
- Examinations 30%
- Executive Interview and Report 10%
- Current Issues in Marketing Term Paper 20%

Your specific letter grade will be assigned as follows:
- A 95% and above
- A− 90%
- B+ 87%
- B 83%
- C 75%
- F below 75%

Attendance and Class Participation

*Class Participation:*
Your participation in class discussions is an important part of this class. Ask questions, share your observations about the topic being discussed,
and contribute to the discussion with examples. You can participate effectively if you (a) read the text and related material before the class, (b) think about the concepts, and (c) pay attention to marketing activities while you are shopping, using the internet, watching television, listening to the radio, and reading newspapers and business publications.

- **Please participate.** What you put into the class will determine what you get out of it—and what others get out of it.
- **Develop confidence in participating.** Some people have good ideas or questions but are hesitant to speak up. Good ideas are lost if they are not shared. And if you have a question it is likely that others will as well. If you are not confident about participating, seize this opportunity to develop in that area.
- **Please keep up with the assignments.** It will make the class more interesting, and more valuable to you. There is quite a bit of work—but it is a reasonable amount and manageable if you do it along the way.
- **I want this course to be a good experience for you.** But, I can’t read minds and if you don’t tell me what you are thinking there is little way for me to know. If you have criticisms of the course, the material, or my teaching methodology, I hope you will let me know.

**Attendance Policy:** You are expected to attend every class for the entire class meeting. Missing more than 2 classes will reduce your final grade by 1 letter grade. Missing more than 3 classes is cause for failing the class.

**Marketing Plan**
After completing Marketing Management, students should be able to construct a quality marketing plan for any product or service. This is a team based project. The material presented in this course through discussions, presentations and readings should provide you with the skills to create a marketing plan for an organization approved by the instructor and members of the team you select to work with during the semester.
The possibilities for clients include local companies/organizations or a new product/service developed by the team. I strongly encourage you to consider developing a plan for a not-for-profit organization.

**Case Simulation**
Working together with members of your team, you will be engaged in a competitive simulation. The simulation is a fun, but challenging, experience. Student groups will compete directly against other teams. Decisions are made once each simulated year. The following issues are addressed in the simulation:

- Learning what it means to have a market-oriented perspective
- Developing and implementing a profitable long-term marketing strategy
- Identifying customer needs and creating products to satisfy them
- Analyzing competitors and understanding their strategic intent
- Using marketing research tools and techniques as a source of competitive advantage
- Allocating scarce resources among products, functions, and other investment alternatives

Your grade for the simulation will be determined based on performance (stock price, net income, market share), assignments, and a final paper outlining your decision making throughout the simulation.

**Examinations**
Each examination will consist of multiple-choice type questions from the textbook, WSJ articles assigned and presentations made during class by other students. Topical coverage of the exams is listed in the topical outline listed below.

**Marketing Executive Interview and Report**
Students will interview a marketing executive and report his/her findings. The report should synthesize your readings and discussions by
illustrating how the executive uses/or does not use marketing theories in the workplace. The written report should be 5 pages or less using questions developed in class or developed by you.

**Current Issues in Marketing Paper**

Each student will develop a term paper on a topic approved by the instructor. This individually prepared paper should show evidence of scholarly research by the student. The specific topic developed will be done in consultation with the instructor. The final 15-page (maximum) paper should contain evidence (bibliographic) that the topic has been thoroughly researched and provides a variety of insights into the topic. Personal interviews are strongly encouraged. The paper should have a minimum of 10 references from a variety of sources including at least 1 refereed journal reference. Examples of marketing journals are presented below. Students will present the initial findings of their study to the class. Topics selected should parallel material covered during week of the presentation.

**Examples of Approved Journals for Current Issues in Marketing Report**

- Journal of Marketing
- Journal of Marketing Research
- Journal of Consumer Research
- Journal of Advertising
- Journal of the Academy of Marketing Science
- Journal of Public Policy and Marketing
- Journal of Advertising Research
- Journal of Retailing
- Marketing Science
- Psychology and Marketing
- Industrial Marketing Management
- International Journal of Research in Marketing
- Management Science
• Decision Sciences
• Journal of Business
• Journal of Business Research
• Journal of Personal Selling and Sales Management
• Journal of International Business Studies
• Journal of Marketing Education

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APPENDIX E

CLIENT EVALUATION FORM FOR MBA 612

Marketing Plan Evaluation

Evaluator: ___________________________________________

Company/Organization: ________________________________

9–10 Superior     7–8 Excellent     5–6 Very Good
3–4 Satisfactory  1–2 Unsatisfactory
Table of Contents

Executive Summary

New Product/Service Description

Strategic Focus and Plan

(Including mission statement, financial and nonfinancial goals, core competency and sustainable competitive advantage—“What makes us different from everyone.”)

Situation Analysis

a. SWOT Analysis
b. Industry Analysis
c. Competitor Analysis
d. Company Analysis, if applicable
e. Customer Analysis

Comments:

Product-Market Focus

a. Marketing and Product Objectives
b. Target Market (including a product-market matrix)
c. Points of Difference
d. Positioning

Comments:

Marketing Program

a. Product Strategy
b. Price Strategy
c. Promotion Strategy
d. Distribution Strategy

Comments:

Financial Data and Projections

a. Past Sales Revenue
b. Five-Year Projections
Comments:

_____ Organizational Charts
Comments:

_____ Implementation Plan
Comments:

_____ Evaluation and Control
Comments:

General Comments: