



MKT 382 STRATEGIC BRANDING

SPRING 2015

Professor	Susan Broniarczyk
Course	MW 2:00-3:15 GSB 3.138
Unique #	05305
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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.

Materials

Aaker on Branding: 20 Principles That Drive Success by David Aaker, 2014, Morgan James Publishing
Available on Amazon or Barnes & Noble (paperback: \$14.19; Kindle: \$7.39)

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

Canvas Readings (Canvas): Required

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 & Twitter	35
Team Brand Inventory	35
Team Final Project and Presentation	<u>110</u>
	<u>440</u>

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%

Description of Requirements

Case Applications (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.

Samsung: Assess and compare Samsung's brand equity using Keller's CBBE pyramid, for the U.S. versus China.

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:

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

Case Analyses (3@40 points each = 120 points)

Your top 3 case analyses from the following 4 cases will count toward your final grade:

Ford Fiesta
 Giant Consumer Products
 Diesel
 Altius Golf

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.

In-Class Contribution (100 points)

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 Feb. 4 readings ("Best Global Brands 2014: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). Brands examined in past projects have spanned the spectrum from retail, CPG, tech, service, and non-profit brands.

All Brand audit deliverables should be e-mailed prior to class to Canvas.

1. Team Brand Selection (0 Points; Feedback Provided)

The first installment of the brand audit is **due on Wednesday, February 11 by 8am**. 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 the 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: Preliminary Consumer Exploratory using ZMET, In-Depth Interviews, & Twitter (35 points)

This second installment of the brand audit is due on **Wednesday, February 25**. 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 three 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 questions and answers in bullet form are OK as long as they capture complete insight.
- 2) Monitor Twitter comments on your brand for at least a 7-day period using www.twilert.com or another Twitter analytics program. Submit a 4 page Word appendix with a representative sample of Twitter comments across 7 day period. (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.)
- 3) Generate a preliminary summary of the brand's customer-based brand equity pyramid in 8-10 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. **Utilize verbatim quotes, images, and tweets to support conclusions. For key associations, illustrate with multiple quotes, images, and tweets.**
 - iv. Assess commonalities and differences across participants, interviews, and Twitter.
 - b. Conclusion slide assessing overall CBBE and update of brand challenge(s).

3. Team Brand Inventory (35 points)

The team brand inventory is the third installment of the brand audit **due on Friday, April 3**. 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 media 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 addresses the six components. Inventory should include substantial supporting documentation (use APA citation) and data on market share, industry trends, advertising expenditure, product assortment, price and promotion comparison data. Emphasis is placed on critical analysis of this data and not simply descriptive reporting.

4. 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 when meeting with Dr. B on April 8-10.** Each team should schedule a 20 minute meeting outside class with Dr. B 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 you 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.

5. 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 on **Wednesday, April 29.** 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.

Course Schedule

Jan. 21 W Intro

Aaker: Chapter 1, Epilogue

“Technology Titans Lead Rankings of Most Valuable Brands”
By Stuart Elliott, *The New York Times*, Oct. 8, 2014 **(Canvas)**

“How to Craft Your Personal Brand Statement”
By Jorgen Sundberg, *theundercoverrecruiter.com* **(Canvas)**

Jan. 26 M 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)**

“Food Companies Get Creative Juices Flowing”
By Landon Hall, *Orange County Register*, November 27, 2013 **(Canvas)**

“How Did Subaru Build a \$10 Billion Market in the US?”
By Eshna Basu, *Motley Fool*, November 2, 2014 **(Canvas)**

“Subaru bursts into American mainstream”
By Michael Wayland, *The Detroit News*, Nov. 11, 2014 **(Canvas)**

“Nike is Dominating World Cup – Here’s Why”
By Mark Fidelman, *Forbes*, July 1, 2014 **(Canvas)**

Submit resume to Canvas: filename *Your Name.Resume* (e.g, Smith.Resume)

Jan. 28 W Development of a Global Brand

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

Aaker: Chapter 14

“Samsung’s Smart-Home Master Plan: Leave the Door Open for Others”
By Stephen Pulvirent, *BloombergBusinessweek*, January 6, 2015 **(Canvas)**

Feb. 2 M Neural Marketing & Brand Positioning

“There’s a Sucker Born in Every Medial Prefrontal Cortex”
By Clive Thompson, *New York Times*, October 26, 2003. **(Canvas)**

Aaker: Chapter 3

“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)**

“Dunkin Donuts and Starbucks: A Tale of Two Coffee Marketing Giants”
By C. Champagne & Teressa Iezzi, *FastCompany*, August 2014 **(Canvas)**

“Jitterbug – calling to seniors”
By Barry Silverstein, brandchannel.com, November 3, 2008 **(Canvas)**

Feb. 4 W Brand Audit

“Best Global Brands 2014: Interbrand” **(Canvas)**

“BrandZ Top 100 Most Valuable Global Brands 2014” **(Canvas)**

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

Background Reading: “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.

Feb. 9 M Brand Positioning

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

“Returning to the Super Bowl in 2015, Dove Men + Care Aims to Challenge Male”
By Lauren Johnson, Adweek, December 10, 2014 **(Canvas)**

Reread “How to Craft Your Personal Brand Statement”
By Jorgen Sundberg, theundercoverrecruiter.com **(Canvas)**

Feb. 11 W Measurement of Brand Equity: Customer Mindset

Aaker: Chapters 4, 6

“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. **(Canvas)**

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

Project Due: Three Potential Brands and Challenges

Feb. 16 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)**

“Oreo Tags Pop Culture”
By Danielle Sacks, *FastCompany*, November 2014 **(Canvas)**

“How Dell’s Social Media Strategy Applies to Your Business”
By Krista Kotrla, November 7, 2013 **(Canvas)**

Feb. 18 W Social Media Marketing**Partner Case Analysis: The Ford Fiesta
(Harvard Business School 9-511-117) (CP)**

Ford Fiesta Case Appendix **(Canvas)**

- Relevant Metrics for Social Media Applications By Key Social Media Objectives
By Donna L. Hoffman and Marek Fodor, *MIT Sloan Management Review*, Fall 2010
-Profiles of Major Media Types

-“Which Ad Strategy Works Best for You?”
By Rosalind Resnick, *Entrepreneur* excerpt, August 14, 2009

“Say Goodbye to the Car Salesman”
By Christina Rogers, *Wall Street Journal*, November 20, 2013 **(Canvas)**

Feb. 23 M Guest Speaker: Social Media Analytics for Brands**Feb. 25 W Brand Names & Logos**

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

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

“How 21 big tech companies got their names?”
<http://thenextweb.com/Insider>, 10/24/2014 **(Canvas)**

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

“Sell Bikes? There’s a Web Domain for That”
By Sarah E. Needleman, *Wall Street Journal*, January 22, 2014 **(Canvas)**

Project Due: Brand Meaning Audit I: Preliminary Consumer Exploratory

March 2 M Pricing, Promotions, & Private Label Brands

“Downsized! More and more products lose weight”
Consumer Reports, February 2011, 18-21 **(Canvas)**

“The 5 Big Mistakes That Led to Ron Johnson’s Ouster at JC Penney”
 By Brad Tuttle, *TIME*, April 9, 2013 **(Canvas)**

“Showrooming no longer top threat”
 By Krystina Gustafson, *cnbc.com*, Jan. 13, 2014 **(Canvas)**

“How Target, Walgreens, and Home Depot Have Forever Changed the Private Label Game”
 By Scott Davis, *Forbes*, May 23, 2013 **(Canvas)**

“P&G’s Pact with Amazon Angers Target”
 By Serena Ng and Paul Ziobro, *Wall Street Journal*, Feb. 25, 2014 **(Canvas)**

March 4 W Brand Promotions

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

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)**

“Keeping a Close Eye on Amazon’s Discounts”
 By Robert Hutton, *Bloomberg Businessweek*, December 9-15, 2013 **(Canvas)**

March 9 M PLUS**March 11 W PLUS****March 16 M SPRING BREAK****March 18 W SPRING BREAK****March 23 M Brand Architecture & Brand Extensions**

Aaker: Chapters 17, 18

“Brand Relationship Spectrum”
 By David Aaker and Erich Joachimsthaler, *California Management Review*, Vol. 42, No. 4, Summer 2000, 8-23 **(Canvas)** – Focus on Figure 2 and pp. 17-22.

“Blue Moon vs. Craft Beer Rivals: MillerCoors Strikes Back”
 By Duane Stanford, *Bloomberg Businessweek*, August 8, 2013 **(Canvas)**

“P&G to Shed More Than Half Its Brands”
By Serena Ng, *Wall Street Journal*, August 1, 2014 **(Canvas)**

“P&G Puts Its Big Brands To Work in Franchises”
Bloomberg Businessweek, Sept. 6-12, 2010, p.20 **(Canvas)**

“Is Porsche Still a Sports Car Maker?”
By Vanessa Fuhrmans, *Wall Street Journal*, May 29, 2013 **(Canvas)**

**March 25 W Guest Speaker: Bobby Patton, VP Marketing, Wholesome Sweeteners
CPG & Food Branding**

March 30 M Vertical Brand Extensions

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

Aaker: Chapter 19

April 1 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 3 F Project Due: Team Brand Inventory

April 6 M Survey Design & Workday

“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. **(Canvas)**

“Make the Most of a Polarizing Brand,”
By Xueming Luo, Michael Wiles, & Raithel, *Harvard Business Review*, November 2013 **(CP)**

Schedule Meetings with Dr. B to Discuss Survey Draft April 8 - April 10

April 8 W Managing Brands Over Time

Aaker: Chapters 13, 15, 16

“Managing Brands Over Time”

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

“Burberry’s CEO on Turning an Aging British Icon into a Global Luxury Brand”

By Angela Ahrendts, *Harvard Business Review*, Jan-Feb 2013 (R1301A) **(CP)**

“Deep Inside Taco Bell’s Doritos Locos Taco”

By Austin Carr, *Fast Company*, July/August 2013 **(Canvas)**

“Getting Past the Big Blues”

By Michal Lev-ram, *Fortune*, October 6, 2014 **(Canvas)**

“Is Innovation Killing the Soap Business”

By Paul Ziobro and Serna Ng, *Wall Street Journal*, April 3, 2013 **(Canvas)**

April 13 M Managing Brands Over Time & Fighter Brand

Individual Case Analysis: Altius Golf and the Fighter Brand

(Harvard Business School 9-913-578) **(CP)**

“Should You Launch A Fighter Brand?”

By Mark Ritson, *Harvard Business Review*, October 2009, (Reprint R0910K). **(CP)**

“Luxury Brands Face Hazards When Testing Lower Costs”

By Brian Chen, *The New York Times*, September 9, 2013 **(Canvas)**

April 15 W Measurement of Brand Equity: Brand Performance and Valuation

“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 **(Canvas)**

“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. **(Canvas)**

Discussion Case: Habitat for Humanity International: Brand Valuation

(Harvard Business School 9-503-101) **(CP)**

April 20 M TBD

**April 22 W Guest Speaker: Michele Grieshaber, CMO, Silicon Labs
Content Marketing**

April 27 M Presentations

**April 29 W Presentations
Final Brand Audit Projects Due**