Marketing 360 – Go-to-Market Strategy & Management
Fall 2018

Contact Information
Instructor: Douglas Boyle
Adjunct Professor
Cell Phone: 713-853-7799 (9am-5pm weekdays)
Email: boylesd@cofc.edu
Office/Hours: Mondays 2:45-3:45pm
Please email or text me to arrange an appointment as I do not have a fixed office location.

Class Sessions
Tate Center – Room #132
Mondays 4:00-6:45pm

Course Objectives
The course is designed to build understanding of the strategic design and operational management of marketing channels. Following completion of the course, the student will be familiar with how to:

- Formulate a "go-to-market" or channel strategy based on an assessment of customer needs, channel capabilities, competitive position and company objectives.
- Manage performance and address key challenges to the strategy arising from either external factors (customer, competitive) or participants (distributors, franchisees).

School of Business Learning Goals
The Go-to-Market Strategy & Management course is also designed to support student development in the following areas:

- Communication skills: Students demonstrate the ability, via both written and spoken work, to effectively present, critique, and defend ideas in a cogent, persuasive manner.
- Intellectual innovation and creativity: Students demonstrate their resourcefulness and originality in addressing extemporaneous problems.
- Synthesis: Students demonstrate the ability to integrate knowledge from multiple disciplines incorporating learning from both classroom and non-classroom settings in the completion of complex and comprehensive tasks.

Course Overview
Go-to-market channels are the systems that firms use to make their goods or services available to end-customers. Channels may be entirely direct (all customer interface & support in-house), but most firms now rely on a network of other companies to deliver optimal customer & business value. In today’s increasingly global, digital and ‘solution-oriented’ environment, channels are changing rapidly and achieving a competitive edge in customer delivery is becoming ever more important.

The course will review and practice application in both the strategic design and management aspects of marketing channels. It will cover a broad range of industries and channel relationship models (e.g. distributor, agent, franchise, JV) and address the unique challenges associated with integrating on-line channels with traditional 3rd party models such as brick-and-mortar retailers.

The course will begin by focusing on strategic design elements: channel mapping and value-chain optimization. Customer, competitive and channel assessments form the foundation for the creative and value-creating decisions associated with designing a new go-to-market strategy. The second half of the
course focuses on operational management: how to increase channel power and navigate key challenges such as channel conflict, change management, channel motivation and performance issues. Throughout the course, the professor will argue from the premise that Channel Stewardship (in short, active management of channels to optimize customer value delivery & satisfaction) is essential to superior and sustained business performance.

The session agenda is summarized below:

<table>
<thead>
<tr>
<th>Session</th>
<th>Topics</th>
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| 1       | • Course introduction & outline  
          • Overview of GTM Channels |
| 2       | • Go-to-Market Strategy:  
          Channel Stewardship |
| 3       | • Go-to-Market Strategy:  
          Channel Mapping |
| 4       | • Outside Speaker: Franchise  
          perspective  
          • Z Corp case discussion |
| 5       | • Go-to-Market Strategy:  
          Building & Updating the Value Chain |
| 6       | • Outside Speaker: Retail perspective |
| 7       | • Sagacity Tea case discussion  
          • Channel Management Framework  
          • Use of Alliances |
| 8       | • Individual Strategy Review project research |
| 9       | • Go-to-Market Strategy:  
          Aligning & Influencing Systems |
| 10      | • Individual Strategy Review discussion  
          • Conflict Management |
| 11      | • Outside Speaker: Multichannel management perspective  
          • Clique Pens case discussion |
| 12      | • Change Management  
          • Performance Management |
| 13      | • Rockwell Automation case discussion  
          • Sales management |
| 14      | • Examination  
          • Student feedback |

**Learning Method**
The principles of effective go-to-market strategy & management will be provided by a few key readings and the Professor’s presentation slides. This ‘theory’ offers the framework for assessment and decision-making, but the emphasis of the course is on ‘real life’ application.

Practice in ‘real life’ application will be achieved through a variety of learning methods: outside speakers from a range of channel models (franchise, retail & multi-channel), student-led discussion of news articles or role-play, and assignments for written case and independent strategy reports. Insights and learning from these exercises will be discussed in-class to ensure that all benefit.

**Reading Materials**
The reading list for the course is summarized on page 11 of this syllabus. Case studies and most of the Notes/Articles need to be purchased from the College Bookstore or Harvard Business Publishing (link to course pack: [https://hbsp.harvard.edu/import/547059](https://hbsp.harvard.edu/import/547059)). Newspaper and journal articles can be accessed via Library links included on page 11 of this syllabus and in the Session tabs on the Oaks course site.
Additionally, the Professor’s presentation slides will be posted to Oaks approximately a week before each class and should be reviewed prior to each session and in preparation for the Examination.

**Grading**

Course grading will be based on the following criteria and weighting:

<table>
<thead>
<tr>
<th>Grade Component</th>
<th>% Weighting</th>
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</thead>
<tbody>
<tr>
<td>Class Participation, including news article &amp; role-play activity</td>
<td>20%</td>
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<tr>
<td>Brief Case Reports</td>
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<tr>
<td>– 4 cases x 10 pts each</td>
<td>40%</td>
</tr>
<tr>
<td>Individual Strategy Review project</td>
<td>20%</td>
</tr>
<tr>
<td>Examination</td>
<td>20%</td>
</tr>
</tbody>
</table>

All grade components will be individual assessments (no team projects). Guidance on each component follows:

- **Brief case reports**
  
  Case study provides an excellent opportunity to apply course learning to a real-world situation. To keep everyone's work load in balance, we will use a focused approach to our case reports – a 1-2 page response to a single question. Each case has been selected to highlight a particular aspect of go-to-market strategy development or implementation. The learning sequence will be to review the management principle in class (e.g. channel mapping), follow it with a case study & written report focusing on the principle (e.g. applying the mapping framework to the 3D printer business), and then discuss the case in the following class session.

The schedule of case reports, questions and due dates is listed below.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Case</th>
<th>Question for Report</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Channel Mapping</td>
<td>Z-Corp</td>
<td>Summarize the 4 Forces (+1) model for Z-Corp’s new printer.</td>
<td>September 17</td>
</tr>
<tr>
<td>Multi-channel development</td>
<td>Sagacity Tea</td>
<td>Which option(s) should Sagacity take and why?</td>
<td>October 8</td>
</tr>
<tr>
<td>Motivating Channels</td>
<td>Clique Pens</td>
<td>Should Clique emphasize MDF or Trade Discounts in its strategy?</td>
<td>November 12</td>
</tr>
<tr>
<td>Change Management</td>
<td>Rockwell Automation</td>
<td>How should Rockwell address the MRO opportunity?</td>
<td>November 26</td>
</tr>
</tbody>
</table>

Case reports should be drafted in line with the following guidelines:

- Reports are limited to a maximum of 2 pages (single side), 1.0+ line spacing with normal font (e.g. TR 12 point or Arial 10 point, normal margins) exclusive of appendices. Please use appendices to visualize your argument or provide data tables but use good judgment on length.
- Case reports must be uploaded to the course Dropbox on Oaks by the start of the class session (4:00pm ET) on the date outlined above. As the case will be discussed in the class session, no late submissions will be accepted.
- Cases are meant to be assessed and actioned with only the information given in the case. Please do not do any additional research on the company as part of your preparation.
- All case reports are individual assignments. Recommendations in this report should be based on individual analysis and assessment only.
• **Individual Strategy Review**

The Individual Strategy Review (ISR) project provides an opportunity for the student to conduct a more comprehensive assessment and strategy recommendation than done on a published case, and to do this work on a business of personal interest. Students should select a business they are familiar with (one where they, their parents, friends or relatives work) or one that interests them from a career or news standpoint.

To complete the project, the student is expected to research the firm’s overall business strategy, market and competitive environment, and channel practices for the firm and the broader industry. The student should plan to interview relevant company personnel (if it’s a company they have relationships with) or study the firm and industry via public documents (annual reports, news articles, etc).

The ISR project paper should address the Channel Mapping and Building/Developing Value Chain steps of the go-to-market strategy development process. Specifically, it should answer two questions:

1. What are your key conclusions from your Channel Mapping assessment?
2. What changes (if any) would you make to the firm’s go-to-market strategy?

The ISR report should be drafted in line with the following guidelines:

- The report is limited to a maximum of 4 pages (single side), 1.0+ line spacing with normal font (e.g. TR 12 point or Arial 10 point, normal margins) exclusive of appendices. Please use appendices to visualize your argument or provide data tables but use good judgment on length.
- The report must be uploaded to the course Dropbox on Oaks by **4:00pm ET, Thursday, October 25th**.
- The ISR is an individual assignment. Recommendations in this report should be based on individual analysis and assessment only.

Finally, it is recommended that students discuss their proposed firm and research plan with the Professor before beginning the project. Coaching is available throughout the study and writing period if needed.

• **Examination**

The course examination will be given during the final class of the semester and represents 20% of the overall course grade. The exam will be comprised of 6-8 short-answer questions (<200 word response), designed to assess understanding and integration of key concepts.

Results will be communicated to students within a week of the examination.

• **Participation in Class discussion**

Active involvement in class discussion is critical to your learning and the learning of other students. Quality of contribution is more important than quantity, but top grades will be provided for comments such as:

- Insightful diagnosis of root cause issues or anticipation of problems
- Proposing potential solutions with rationale and key success factors
- Building on other student comments & proposals, either as an enhancement or constructive challenge
- Thoughtful questions for outside speakers

Each student’s contributions will be evaluated after each session against the following rating standard:

◊ Non-Participant: Present but did not contribute or missed class. No participation credit for grading purposes.
◊ Minimal Contributor: Ideas offered were not substantive or not particularly constructive. Little new perspective added.
◊ Good Contributor: Active and constructive contributions provided. Good preparation and reflection on theory or cases evident. Arguments well substantiated.
◊ Outstanding Contributor: Contributions reflect exceptional preparation and insight, connecting material to broader business context. Arguments are well substantiated and persuasive.

In addition to participation throughout each of the class sessions, the course has been structured to include discussion of numerous newspaper articles and a role-play. Students will take turns leading a class discussion of each article or participate in the role-play (two students per topic). The Professor will outline specific questions that the students should consider in preparing their discussion in the class session before the topic is on the agenda and will ask for volunteers. It is expected that every student will participate in at least one news/role-play exercise during the term. Participation is worth 20% of the overall course grade, approximately 15% based on contributions throughout the term (including outside speaker discussion engagement) and 5% based on the news/role-play discussion.

Policies
The following policies will apply to the course:

- **Attendance**
  A sign-in sheet will be used in each class session – please remember to sign-in at the start of each class!

  Because attendance is crucial to fully understanding strategic marketing principles and benefiting from classroom discussion on practical application, students are expected to attend all classes. To minimize gaming, the only ‘excused’ form of absence is when a student is acting as an official representative of the College (e.g. academic or athletic competition). Regarding assignments due during excused absences: Case reports should be handed in prior to leaving as the solution will be discussed in class; reasonable accommodation will be made to reschedule exam times if conflicted.

  Students are allowed one ‘unexcused’ absence for the course (one of the 14 sessions) for any other reason. Please contact me as early as possible when you determine that you will need to miss a class – I appreciate the notice and it gives us an opportunity to discuss assignments or class topics.

  Students should expect to receive a Withdrawn Excessive Absences (WA) grade if they have two or more ‘unexcused’ absences.

- **College of Charleston Honor Code and Academic Integrity**
  Lying, cheating, attempted cheating, and plagiarism are violations of our Honor Code that, when identified, are investigated. Each incident will be examined to determine the degree of deception involved.

  Incidents where the instructor determines the student’s actions are related more to a misunderstanding will handled by the instructor. A written intervention designed to help prevent the student from repeating the error will be given to the student. The intervention, submitted by form and signed both by the instructor and the student, will be forwarded to the Dean of Students and placed in the student’s file.

  Cases of suspected academic dishonesty will be reported directly by the instructor and/or others having knowledge of the incident to the Dean of Students. A student found responsible by the Honor Board for academic dishonesty will receive a XF in the course, indicating failure of the course due to academic dishonesty. This grade will appear on the student’s transcript for two years after which the student may petition for the X to be expunged. The student may also be placed on disciplinary probation, suspended (temporary removal) or expelled (permanent removal) from the College by the Honor Board.
Students should be aware that unauthorized collaboration—working together without permission—is a form of cheating. Unless the instructor specifies that students can work together on an assignment, quiz and/or test, no collaboration during the completion of the assignment is permitted. Other forms of cheating include possessing or using an unauthorized study aid (which could include accessing information via a cell phone or computer), copying from others’ exams, fabricating data, and giving unauthorized assistance. Research conducted and/or papers written for other classes cannot be used in whole or in part for any assignment in this class without obtaining prior permission from the instructor.

Students can find the complete Honor Code and all related processes in the Student Handbook at http://studentaffairs.cofc.edu/honor-system/studenthandbook/index.php

- **Cell Phones, Laptops & Tablets**
  Cell phones should be turned off during class session. Please let me know prior to class if you are facing extraordinary circumstances and need to keep your phone on. Laptop and Tablet computers should be kept in a closed position during class session.

- **Disability**
  Please contact me if you have a disability that will impact your work in this course. Students will need to apply to the SNAP Office (Lightsey Center, Suite 104) for approval, but I would be glad to work with anyone requiring accommodation.
<table>
<thead>
<tr>
<th>Session 1</th>
<th>Topics:</th>
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<tbody>
<tr>
<td>Monday, August 27</td>
<td>• Course outline</td>
</tr>
<tr>
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<td>• Channels overview</td>
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<tr>
<td>Learning Objectives:</td>
<td>• Understand course objectives and requirements</td>
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<td>• Understand the basic types of channel structure, roles of participants and common applications</td>
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<tr>
<td>Assignments:</td>
<td>No assignments due for this class</td>
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</table>

| Reading & Cases: | • Professor’s slides (posted 1 wk before class) |

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<tr>
<th>Session 2</th>
<th>Topics:</th>
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<tbody>
<tr>
<td>Monday, September 3</td>
<td>• GTM Strategy: Channel Stewardship</td>
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<tr>
<td>Learning Objectives:</td>
<td>• Understand Framework for designing &amp; managing a Go-To-Market strategy.</td>
</tr>
<tr>
<td></td>
<td>• Understand the role of Channel Steward</td>
</tr>
<tr>
<td>Assignments:</td>
<td>No assignments due for this class</td>
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</tbody>
</table>

| Reading & Cases: | • Rangan, “Developing & Managing Channels”. Sections 1 & 2.1 (pages 3-7) |
|                 | • “McDonald’s Boosts Payout for Franchisees”, WSJ |
|                 | • Professor’s slides (posted 1 wk before class) |

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<tr>
<th>Session 3</th>
<th>Topics:</th>
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<tbody>
<tr>
<td>Monday, September 10</td>
<td>• GTM Strategy: Channel Mapping</td>
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<tr>
<td>Learning Objectives:</td>
<td>• Understand the key components and perspectives required to complete Channel Mapping.</td>
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<td></td>
<td>• Apply Channel Mapping method to the Soren Chemicals case</td>
</tr>
<tr>
<td>Assignments:</td>
<td>No assignments due for this class</td>
</tr>
</tbody>
</table>

| Reading & Cases: | • Rangan, “Developing & Managing Channels”. Section 2.2 (pages 7-12) |
|                 | • Rangan & Yong, “Soren Chemicals”. |
|                 | • “Tough Task for Next Uber Leader”, NYT |
|                 | • Professor’s slides (posted 1 wk before class) |

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<tr>
<th>Session 4</th>
<th>Topics:</th>
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<tbody>
<tr>
<td>Monday, September 17</td>
<td>• Outside Speaker: Franchise perspective, Joe Norton, Taziki’s Mediterranean Cafe</td>
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<td></td>
<td>• Z-Corp case discussion</td>
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<tr>
<td>Learning Objectives:</td>
<td>• Gain insight into Franchise model through discussion with local franchise business leader</td>
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<td></td>
<td>• Further experience in Channel Mapping through drafting the Z-Corporation case report and class discussion.</td>
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<tr>
<td>Assignments:</td>
<td>Z-Corporation brief case report: “Summarize Rangan’s 4-Forces+1 model for Z-Corporation’s new 3D printer.”</td>
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<td>• Due to Course Dropbox before class start (400pm, Sept 17)</td>
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<td>• See Syllabus page 3 for further guidance on report format</td>
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</table>
## Course Schedule – Sessions # 5 – 7

All Class Sessions held in Tate Center #132, 4:00-6:45pm, with exception of Session 6, which will be held at Harris Teeter, 290 E. Bay Street

<table>
<thead>
<tr>
<th>Session</th>
<th>Date</th>
<th>Topics</th>
<th>Reading &amp; Cases</th>
<th>Learning Objectives</th>
<th>Assignments</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>Monday, September 24</td>
<td>GTM Strategy: Building &amp; Updating Value Chain</td>
<td>Rangan, “Developing &amp; Managing Channels”. Section 2.3 &amp; 2.5 (pages 13-18, 24-27)</td>
<td>Become familiar with process of designing a go-to-market strategy: identifying key customer requirements, assessing capabilities, option development &amp; selection</td>
<td>No assignments due for this class</td>
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<td></td>
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<td></td>
<td>“Professor’s slides (posted 1 wk before class)”</td>
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<td>吉</td>
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<td></td>
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<td><strong>Assignments:</strong></td>
<td>吉</td>
<td>吉</td>
</tr>
<tr>
<td>6</td>
<td>Monday, October 1</td>
<td>Outside Speaker: Retail perspective, held with Rich Shea at Harris Teeter, 290 E. Bay St.</td>
<td>None</td>
<td>Broaden perspectives of retail industry. Leverage existing student experience as customers with grocery retailing into an understanding of (a) retailer management objectives and practices, and (b) product marketer objectives and practices.</td>
<td>No assignments due for this class</td>
</tr>
</tbody>
</table>
| 7       | Monday, October 8 | Sagacity Tea case discussion                                           | Quelch and Handlin. “Sagacity Tea: What Direction for Growth?”                   | Further experience in Go-to-Market strategy design through discussion of Sagacity Tea case. | Sagacity Tea brief case report: “Which option(s) should Sagacity Tea take and why?”
|         |            | Channel Management Framework                                           | Stobaugh, “Note on use of Alliances”                                           | Understand how a well-designed CMF improves strategy implementation & control.    | Due to Course Dropbox before class start (400pm, Oct 8) |
|         |            | Use of Alliances                                                       | “Alibaba’s Online Growth Surges”, NYT                                            | Become familiar with the advantages and risks associated with Alliance-based channel models. | See Syllabus page 3 for further guidance on report format |

Assignments:
Sagacity Tea brief case report: “Which option(s) should Sagacity Tea take and why?”
- Due to Course Dropbox before class start (400pm, Oct 8)
- See Syllabus page 3 for further guidance on report format
| Session 8 | No Class Session  
*Individual Strategy Review project research & study* |
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<tbody>
<tr>
<td><strong>Learning Objectives:</strong></td>
<td><strong>Assignments:</strong></td>
</tr>
<tr>
<td>- Complete the Mapping and Building/Updating Value Chain steps of Go-to-Market Strategy development on a business of personal interest.</td>
<td>No assignments due for this class</td>
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</tbody>
</table>

| Session 9 | Topics:  
*GTM Strategy: Aligning & Influencing Systems* |
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<tbody>
<tr>
<td><strong>Learning Objectives:</strong></td>
<td><strong>Assignments:</strong></td>
</tr>
</tbody>
</table>
| - Understand the key elements of internal & external organizational alignment and why it’s critical for success.  
- Become familiar with the key legal and regulatory constraints to channel practices. | Individual Strategy Review projects due to Course Dropbox by Thursday, October 25, 400pm  
- See Syllabus pages 3-4 for further guidance |

| Session 10 | Topics:  
*Individual Strategy Review Project discussion  
Conflict Management* |
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<tbody>
<tr>
<td><strong>Learning Objectives:</strong></td>
<td><strong>Assignments:</strong></td>
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</tbody>
</table>
| - Understand the different causes of channel conflict, which forms are most dangerous and how to address  
- Practice conflict management skills via a Country Market case role play. | No assignments due for this class |

| Session 11 | Topics:  
*Outside Speaker: Multichannel management perspective, Nate Collier, Le Creuset  
Clique Pens case discussion* |
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<tr>
<td><strong>Learning Objectives:</strong></td>
<td><strong>Assignments:</strong></td>
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</tbody>
</table>
| - Gain deeper understanding of the operational challenges of multi-channel marketing systems through discussion with local business manager.  
- Practice strategy implementation through the Clique Pens case | Clique Pens brief case report: “Should Clique emphasize MDF or Trade Discounts in its strategy?”  
- Due to Course Dropbox before class start (400pm, Nov 12)  
- See Syllabus page 3 for further guidance on report format |
### Course Schedule – Sessions # 12 – 14
*All Class Sessions held in Tate Center #132, 4:00-6:45pm*

<table>
<thead>
<tr>
<th>Session 12</th>
<th>Topics:</th>
<th>Reading &amp; Cases:</th>
</tr>
</thead>
</table>
| Monday, November 19 | - Change Management  
- Performance Management | - Bucklin, et al. “Are you tough enough to manage your channels?”  
- “Nike ... Didn't Need Amazon...”. WSJ  
- Professor’s slides *(posted 1 wk before class)* |

**Learning Objectives:**
- Understand the importance of Change Management programs for effective management of channel partners  
- Understand the key components of a good Performance Management system, common traps and organizational challenges.

**Assignments:**
- No assignments due for this class

<table>
<thead>
<tr>
<th>Session 13</th>
<th>Topics:</th>
<th>Reading &amp; Cases:</th>
</tr>
</thead>
</table>
| Monday, November 26 | - Rockwell Automation case discussion  
- Sales Management  
- “Wells Fargo to Eliminate Product Sales Goals”, WSJ  
- Professor’s slides *(posted 1 wk before class)* |

**Learning Objectives:**
- Practice decision-making on evolving go-to-market strategy and anticipating change management requirements through Rockwell Automation case.  
- Understand key elements of how to structure, align and motivate channel sales organizations.  
- Reinforce key GTM strategy and management principles.

**Assignments:**
- Rockwell Automation brief case report: “How should Rockwell address the MRO opportunity? What steps should they take to help ensure success?”  
- Due to Course Dropbox before class start *(400pm, Nov 26)*  
- See Syllabus page 3 for further guidance.

<table>
<thead>
<tr>
<th>Session 14</th>
<th>Topics:</th>
<th>Reading &amp; Cases:</th>
</tr>
</thead>
</table>
| Monday, December 3 | - Examination *(first 90’ of class)*  
- Student Feedback | None |

**Learning Objectives:**
- Assess understanding and integration of key course concepts.  
- Give Professor feedback on how to improve course for future generations!

**Assignments:**
- No assignments due for this class except for Examination preparation
Reading List

Cases:

Notes/Articles:

News Publications: