

COURSE SYLLABUS

INSTRUCTOR	Professor Cassie Mogilner (pronounced Moe-gil-ner)
CLASS MEETINGS	Tuesdays and Thursdays #278 10:30-11:50AM #778 1:30-3:00PM
OFFICE HOURS	Anytime. Please email me, and we'll set up an appt.
CLASS POLICIES	Attendance of the first class is mandatory. Cell phones, laptops, and iPads are not permitted in class.
COURSE MATERIALS	To keep costs down, there is no required textbook; instead we'll rely on a course reader, which incorporates a few chapters from some seminal books, cases, articles, and a packet of handouts. ¹
SUPPLEMENTAL READING	<p>A number of sources of additional information are available to further supplement the course readings which, depending on your career interests and goals, you may want to read at some point. None are required.</p> <p>There are several books that provide useful perspectives and ideas on brand and product management, Keller's <u>Strategic Brand Management</u>, Aaker's <u>Managing Brand Equity, Building Strong Brands</u> and <u>Brand Leadership</u> (with Erich Joachimsthaler), Lehmann and Winer's <u>Product Management</u>, and Kapferer's <u>The New Strategic Brand Management</u>. Most students find the articles in the academic journals dry and abstract, but the <u>Journal of Marketing</u> and <u>HBR</u> have more of an applied focus that tends to be easier to digest.</p> <p>Finally, in terms of current industry information, <u>Business Week</u>, <u>Fortune</u>, <u>Forbes</u>, and <u>The Economist</u> have marketing articles frequently dealing with brand issues. The <u>Wall Street Journal's</u> Marketplace section has weekly features on advertising that often addresses branding issues. Two useful industry trade publications are <u>Advertising Age</u> and <u>ADWEEK</u>. To find out more about various consumer characteristics or trends, see <u>American Demographics</u>.</p>

¹ Many of these handouts are selected from Keller's, [Strategic Brand Management](#) (Prentice-Hall). This book is complete with examples, tools, benchmarks and theories regarding brand management.

COURSE OVERVIEW

Which brands make you happy? Apple? Starbucks? The Daily Show? Google? What draws you into these brands? How do companies create compelling brand experiences? How could you cultivate a brand that fosters consumers' happiness? This course explores such questions with the goal of identifying the ingredients for building and managing an inspired brand, where brand is defined as "a reputation" – departing from traditional perspectives of brand.

The class will involve a broad ecosystem of contributors. Leaders from the world of brand—both small entrepreneurial companies and large, global market-leaders—will be incorporated into the class to offer first-hand perspectives about the challenges and lessons along their varied paths to success. This approach is intended to make the walls between the classroom and the world outside a little more porous.

The course has been created for individuals interested in building their own brands and/or immersing themselves in the enhancement of an existing brand. The course will interweave lectures, guest speakers, case discussions, in and out of class exercises—all of which will culminate in a Brand Audit group project that students will present in the final days of class.

The course will provide students with an appreciation of the role of branding and (taking a consumer-centric approach) will augment students' ability to think creatively and critically about the strategies and tactics involved in building, leveraging, defending, and sustaining an inspired brand.

Broadly, the course will be divided into four parts:

1. Understanding Brand
2. Measuring Brand
3. Crafting Brand
4. Managing Brand

The courses' basic objectives are to:

- Provide an appreciation of the role of branding in consumers' daily experiences, in addition to creating shareholder value
- Increase fluency with the core principles underlying a consumer-centric approach to brand strategy, and create familiarity with research tools that illuminate the meaning and strength of any particular brand
- Augment students' ability to think creatively and critically about the strategies and tactics involved in building, leveraging, defending, and sustaining inspired brands
- Encourage the application of branding principles to oneself-- so as to be aware when building and communicating one's own personal and professional reputation

CLASS STRUCTURE

The course is organized into four modules that collectively address the course objectives.

Module 1: Understanding Brand

This module provides a basic understanding of branding: what a brand is, what functions brands serve, and when a branding strategy is relevant for consumers and the firm. The cases in this introductory module expose students to the underlying conceptual framework for the course in which brand meanings—resonant, unique, and well-managed over time—create brand strength, which in turn provides brand value to the firm in the form of competitive advantage, increased market share and profits, and reduced risks. The main sessions in this module focus on establishing the key foundations of a strong brand: value proposition, brand personality, brand positioning, and brand relationships – and the distinction between brand image and identity.

Module 2: Measuring Brand

In order to really understand a brand's meaning and its sources of strength, a critical step is measurement. The cases in this module cover traditional and non-traditional tools for measuring brand strength – both qualitative and quantitative measures (e.g., interviews, focus groups, ethnography, surveys and brand valuation). Exposure to these tools will be integral in helping students learn from consumers the meaning and strength of a particular brand, for instance that which they've selected to explore in the Brand Audit Project.

Module 3: Crafting Brand

This module provides a concept of what is involved in the formulation of the brand asset. The most important task in designing the brand is specifying the unique and relevant meanings the brand is to capture. These meanings, expressed in the form of a brand positioning statement and which can be conveyed visually in a mental map, provide the foundation for the brand design task as they form the theme around which the brand experience is framed and the marketing mix aligned. This module focuses on identifying brand elements (e.g., brand names, logos, slogans, jingles, package designs, retail space, online space) that communicate the intended brand meaning.

Module 4: Managing Brand

The cases in this final module focus on the challenges that confront more mature brands as they attempt to grow and stay relevant over time, and the stewardship skills and perspectives that enable sustained brand health. We explore the growth of brand equity through extensions, strategic alliances between brands, and global expansion. We also examine the design of brand portfolios to maximize equity for the firm, and investigate repositioning and revitalization strategies. Collectively, the cases in the module help to convey the complexity and significance of the long-term task of brand maintenance.

#	CLASS	TOPIC	ASSIGNMENT/ READINGS DUE
1	Jan. 16 th	What is a Brand?	Due: Favorite Brands worksheet in syllabus appendix Reading: Course Syllabus; Brands and Branding
2	Jan. 21 st	MTV Case— Consumer-Based Brand Equity	Prepare: MTV Case
3	Jan. 23 rd	Understanding Brand	Reference article: Dimensions of Brand Personality
4	Jan. 28 th	The Wharton Brand with Professor Patti Williams	
5	Jan. 30 th	Guest Lecture: Katie Kiel, Marketing Manager for Clorox Liquid Bleach— A Day as a Brand Manager	
6	Feb 4 th	Super Bowl Commercials Analysis	Prepare: Analysis of your chosen commercial
7	Feb. 6 th	Brand-Person Relationships Case— Brand Meaning	Prepare: Exploring Brand-Person Relationships Case Reference articles: Brand Relationship Theory When Good Brands Do Bad
8	Feb.11 th	Harley Davidson Case— Brand Community	Prepare: Harley Case Due: Each group must email me the names of the group members and a listing of 3 potential brands for Brand Audit Project
9	Feb. 13 th	Brand Positioning	Due: Personal Image-Identity Gap Write-up Self-Positioning Statement Reference article: Firm Stereotypes Matter
10	Feb. 18 th	Measuring Brand	Reference readings: Brand Valuation Note Chapt. 9, Quantitative Research Techniques
11	Feb. 20 th	Guest Lecture: Ambika Nigam & Dan Wandrey, IDEO— Learning through Ethnographies	Due: Brand Relationship Interview Write-up
12	Feb. 25 th	Crafting Brand	Due: Six word personal story & Six word brand story Reading: Famous Names Selecting a New Name for Security Capital Pac Trust Claiborne Asks Web Surfers To Name New Line Naming the Edsel
13	Feb 27 th	Guest Lecture: Michelle Hayward, President of Bluedog Design— Package Design	Due: Positioning Statement for Brand Audit Perceptual Map for Brand Audit
14	March 4 th	Guest Lecture: Peter Intermaggio, Senior VP of Marketing Communications at Comcast— Branding Xfinity	
15	March 6 th	Guest Lecture: Tracey Strober, Director of Store Operations & Communications, and Drew Fifield, Learning and Development Manager at Urban Outfitters— In Store Experience	Due: Mystery Shopping Experience Write-up
16	March 18 th	Guest Lecture: Sam Mogilner, Director of Entertainment Marketing & Business Development at Horizon Media— Brand Partnerships	
17	March 20 th	Class Presentations of Brand Qualitative Insights	
18	March 25 th	Guest Lecture: Owen Tripp, Co-founder of Reputation.com— Managing Brand YOU in the Digital World	
19	March 27 th	Managing Brand	Reading: The Brand Relationship Spectrum Should You Take Your Brand To Where The Action Is? Extend Profits, Not Product Lines Brand Versus Private Labels: Fighting to Win
20	April 1 st	Guest Lecture: Kim Spaulding, VP of Global Coffee Category Management at Starbucks, Starbucks Branding and Brand Extensions	Reading: Chapt 1-3 of <i>Onward: How Starbucks Fought for Its Life without Losing Its Soul</i>
21	April 3 rd	Guest Lecture: Eric Anderson, VP of Europe, Middle East & Africa for Domino's Pizza, Taking a Brand Global	
22	April 8 th	Steinway and Sons Case— Brand Extensions	Prepare: Steinway & Sons Case
23	April 10 th	No class: Group Consulting for Brand Audit Project	
24	April 15 th	Time, Money, and Happiness	Reference articles: Time vs. Money Effect Time, Money, and Social Connection How Happiness Affects Choice
25	April 17 th	Course Wrap-up	Reading: The Brand Report Card
26	April 22 nd	Brand Audit Project Presentations	Due: All groups' Brand Audit written reports
27	April 24 th	Brand Audit Project Presentations	
28	April 29 th	Brand Audit Project Presentations	

COURSE REQUIREMENTS AND GRADING

Your overall course grade will reflect your fulfillment of the requirements based upon the following weights:

Class Participation & Attendance	30%
Content Absorption Check-ins	10%
Individual Assignments	
Personal Image-Identity Gap Write-up	5%
Self Positioning Statement	2%
Brand Relationship Interview	6%
6 word Personal & Brand Stories	2%
Mystery Shopping Experience Write-up	5%
Brand Audit Project	
Brand Positioning Statement and Perceptual Map	5%
Qualitative Insights Presentation	5%
Written Audit	15%
Presentation	15%
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TOTAL	100%

Class Participation

Critical to being part of the class is being *at* each of the classes, both physically and mentally. The course is developed to be an ongoing conversation, and like any meaningful conversation, it requires all parties to be *present*, again—both physically and mentally.

To assess your physical presence, I will take attendance. Attendance will comprise a significant portion of your participation grade. You should notify me by email of any absences, but be aware that except for cases of grave illness, a death, or other emergencies, your grade will be hurt. Classes start on time. Being late will count as an absence.

Beyond just being physically present, you also need to be there mentally. To allow the rest of the class to benefit from your engagement and fabulous insights, speak up and become part of the conversation.

Grading this aspect of class participation is necessarily subjective. Some of the criteria for evaluating class participation include:

1. Are you prepared? Do your comments show evidence of deep case analysis (vs. stating case facts)?
2. Are the points you make relevant to the discussion?
3. Are you an effective communicator? Are concepts presented in a concise and convincing fashion?

Go for quality NOT quantity. For a good rule of thumb, think 2 – 2: don't speak more than twice per class, and speak at least once every two classes.

Content Absorption Check-ins

Twice over the course of the semester, I will carve out 15 minutes of class to check-in and see if you have absorbed what has been discussed in class. The content you should absorb includes that from the lectures, guest speakers, and cases. I'm not expecting you to memorize details, but I do expect you to be absorbing the main takeaways...to ensure that you do, in fact, take something away from the course. I will not tell you when we are going to have these check-ins to encourage you to stay engaged (i.e., present) throughout the course.

Individual Assignments

There are five small individual assignments, three of which were designed to encourage you to apply brand concepts to your own personal brand. See the schedule on page 4 for their due dates, and the appendix portion of the syllabus for instructions for each assignment. Although these will be graded, their primary purpose is to generate discussion in class.

You will be submitting these assignments through Canvas. Don't forget to include your name and section number on your actual assignment!

Brand Audit Project

Students will form brand management teams to work on this project. Note: You are responsible for forming a five-person team for the purpose of group projects. Please take the time to put together a team that will work together well in terms of schedules, skillsets, goals, etc. All groups must be formed and potential brands identified by the start of the eighth class session.

Your assignment is to select a real brand (new or well-established) and conduct an audit for that brand. Every team must study a different brand, so pre-approval with me is necessary (see below). It's great (although not necessary) if you pick a brand to which at least one member of the group has access so that you could get a briefing on the firm's situation from someone in a position of responsibility. Generally, the deeper you get into the company, the more insightful the project becomes and the greater the likelihood that your recommendations will be implemented and that you will have an impact. A startup that has not yet introduced a product is acceptable, so long as the product definition is sufficiently developed to allow for a meaningful brand audit. Feel free to pick a service (e.g., non-profit or for-profit) or product (e.g., consumer, technology, or person).

The goal of the brand audit is to assess its sources of brand equity and suggest ways to improve and leverage that brand equity. Thus, brand audits are made up of brand inventories (comprehensive summary of the existing marketing and branding program) and brand exploratories (the results of empirical research), followed by a recommendation for brand strategy and strategy implementation.

The final project will include a written proposal as well as an oral presentation to the class. Further details are provided below and will also be reviewed in class. Presentations will be given during class on April 22nd, 24th, and 29th. **Regardless of what day your group will be presenting, every group's written brand audit is due at the beginning of class on April 22nd.**

Participation Assessment:

Each member of the group will be asked to assess the proportion of the work that each group member contributed to the overall brand audit. You will find the form in the syllabus appendix, and the completed form should be turned in directly to me by each member of the group on the day your group gives the final presentation. This information will contribute to my final assessment of each member's final grade for the brand audit.

The formal requirements for the brand audit project are four interim steps and a final paper, as follows:

Interim steps:

- 1) In the fourth week of class, Feb 11th, submit the names of your team members and three options of brands on which you would like to focus. Since every team must study a different brand, this will help ensure there are no conflicts.

- 2) On February 27th, you will be asked to hand in a preliminary perceptual map and the positioning statement of your brand. These may be revised for your final project, but this is to get you started in applying what we learn in class to better understand your brand.
- 3) On March 20th, your group will present any insights about your brand you garnered from your qualitative investigation—either interviews or focus groups.

Final Report.

The final report is due at the beginning of class on **April 22nd** for every group. In it, you should convey your vision of a “mental map” for the brand in terms of the key brand associations. You will have conducted some qualitative market research using ideas discussed in previous class sessions, the HBS case on Brand-Person relationships, and the readings. Conduct either two one-on-one interviews or one 6-8 person focus group, and one survey (you will have two pieces – complementing qualitative work with quantitative work). Find out about the brand associations, brand relationships, sources of equity, etc. How is this brand perceived by your informants? The final report will use all of this information to identify the sources of brand equity, providing the basis for your recommendations. Any questionnaire used to guide a focus group, depth interview or your survey should be included in an appendix in the final report.

After developing a detailed profile or mental map from the brand exploratory, the next task is to provide recommendations concerning how the brand should be managed by analyzing the brand inventory. How can brand equity be built and how can it be effectively leveraged going forward? To answer this question, you should outline creative and relevant directions for management of your chosen brand, providing justification where appropriate with course concepts.

Page limitations: 1 page executive summary; 10 pages of text (single spaced); up to 5 pages of appendices. I will distribute a more detailed set of guidelines for this brand audit approximately halfway through the course.

Oral Presentation.

Each team will have about 10-15 minutes to present their brand audit. These presentations should highlight the key insights from the Brand Audit, and can be presented as a PowerPoint presentation, in the form of a video, or any other compelling and engaging format—be creative! Presentations will take place on April 22nd, 24th, and 29th.

Syllabus Appendix

Favorite Brands Worksheet

Bring this with you to the first day of class, and be prepared to share one of them.

What are 3 of your favorite brands? Why?

1)

2)

3)

Preparation Questions for Case Analyses

Below are the preparation questions for each of the case studies we will discuss in class. Note that you do NOT have to answer these questions as they only serve as a guideline or starting point for your analysis. The questions are meant to help you understand the main problems addressed in the case, and to give you a sense of the issues and themes we will touch on.

MTV

1. What is the MTV brand image? How valuable are the MTV brand associations? What should its core values be?
2. Describe the current sources of MTV's brand equity. How have they changed over time? How have they remained constant?
3. What is the role of music within MTV?
4. Technology is changing the way viewers watch television and interact with programs. Think about the role of the Internet and technology within MTV. What has MTV done well to integrate technology with the brand and what else should MTV do?
5. Over the years, MTV has evolved from a channel about music to a channel about the culture of music to a channel about culture. What does the future hold for MTV?

Harley Davidson

1. Should Harley-Davidson continue to sponsor the Posse Ride? Why or why not? What role should the Posse Ride play in the HOG events mix?
2. How should the Posse ride be designed to maximize its effectiveness and profit-making potential, should you decide to keep it?
3. What is HOG's role in developing community for the Harley-Davidson brand?
4. How can HOG itself be maximized?

Steinway Pianos—Buying a Legend

1. What do you think of Steinway's 1992 decision to launch the Boston line of pianos? What impact might this new line of pianos have on the company? Having purchased the company in 1995, what should Messina and Kirkland do with the Boston piano line?
2. Moving forward (from 1995), what is Steinway & Sons single biggest strength? How can it best be leveraged? What is Steinway & Sons biggest weakness? How can it be minimized or eliminated?
3. What do you think of the initiatives mentioned in Cases C and D?

Individual Assignment #1

Personal Image-Identity Gap Analysis

To manage a brand effectively, you must be constantly in touch with what the consumer thinks about your brand and what you think of your brand. It helps to have some language to pull these constructs apart: **Brand image** is defined as the set of (actual) associations the consumer has with a brand; **Brand identity** is defined as the set of (aspirational) associations the company would like to have of its brand. Understanding how the brand is perceived internally and externally is critical to build and manage a strong brand.

This concept is equally useful in assessing and managing your personal brand. To conduct an image-identity gap analysis for your personal brand, do the following:

1. Assess your identity (how you see yourself), by writing down:
 - a. What are the top (as in first that come to mind, not as in best) 5 words that you associate with yourself?
 - b. What are you not? For example, what are your three areas of incompetence?
2. Assess your personal image (how others see you), by asking 5 others (friends, family, or classmates):
 - a. What are the top 5 words that come to mind when they think of you?
 - b. What are 3 (positive) things you are not?
3. Analyze your findings on one single-spaced page (you can run over to the other side of the page):
 - a. Describe your identity. Identify which of the attributes are more central (your essence) and which are part of your more extended identity. Identify your areas of incompetence.
 - b. Visually describe your image with a mental map.
 - c. Identify and discuss any discrepancies between your identity and image.
 - d. Would it (ever) be important to address those gaps? If yes, what steps can you take to close them?
 - e. With respect to a certain group (e.g., Wharton students, all college students, your family, your gender), what are your points of parity? What are your points of differentiation? That is, with the insight from identifying your identity and image, how should you position yourself from a personal brand perspective?

Individual Assignment #2

Self Positioning Statement

Draft a positioning statement for yourself. The statement should be short and pithy yet capture your unique brand essence. It should also address your target audience's key insight (that one singular need, desire or want that motivates or drives their behavior).

A good general rule of thumb is to use 25 words or less for your final statement.

You should think about the following when constructing your statement:

- 1) target audience
- 2) target audience's customer insight (singular need, desire or want)
- 3) your unique brand essence or equity

You may (but don't have to) include this information in the document you turn in. This information should be clear from reading your final statement, which should be able to stand alone.

You can position yourself towards employers, business acquaintances, friends, future boyfriends/girlfriends and even potential in-laws. Keep in mind, that to be compelling you must be concrete!

The template below identifies each component that needs to be included either explicitly or implicitly in your positioning statement. You do not have to adhere to the order in the template, but it is quite logical.

Positioning Statement Template

_____ (product/brand)
is _____ (unique and most important claim)
among all _____ (competitive frame)
for _____ (segment)
because _____ (support).

Individual Assignment #3

Brand Relationship Interview

For class #7, you were asked to read “Exploring Brand-Person Relationships” to give you insight on how you may do this exercise. The case itself illuminates the concept of brand meaning by looking in-depth at the connections that form between three women and the brands they use. Thus, it sheds light on the insights that are possible when consumers’ lives are understood holistically, and brands are considered to be part of those lives. Perspectives from psychology, sociology, and the study of culture can be applied to illuminate the meanings brands contain for the consumers who use them.

Interview a classmate regarding a relationship they have or had with a brand. The brand you interview this person about should **NOT** be the brand you’re focusing on for your brand audit project. Please prepare a 1 page (single-spaced) write-up including your answers to the three following questions. If you need, you can use the back-side of the page (indeed, this effectively means you can use two pages. Go crazy.).

What you should be looking for is information about the relationship that can be managerially useful. That is:

- (1) What insights were revealed?
- (2) As a brand manager, what would you do with this information?
- (3) How might you more quantitatively measure amongst a larger population the type, quality, and strength of relationship revealed in your interview?

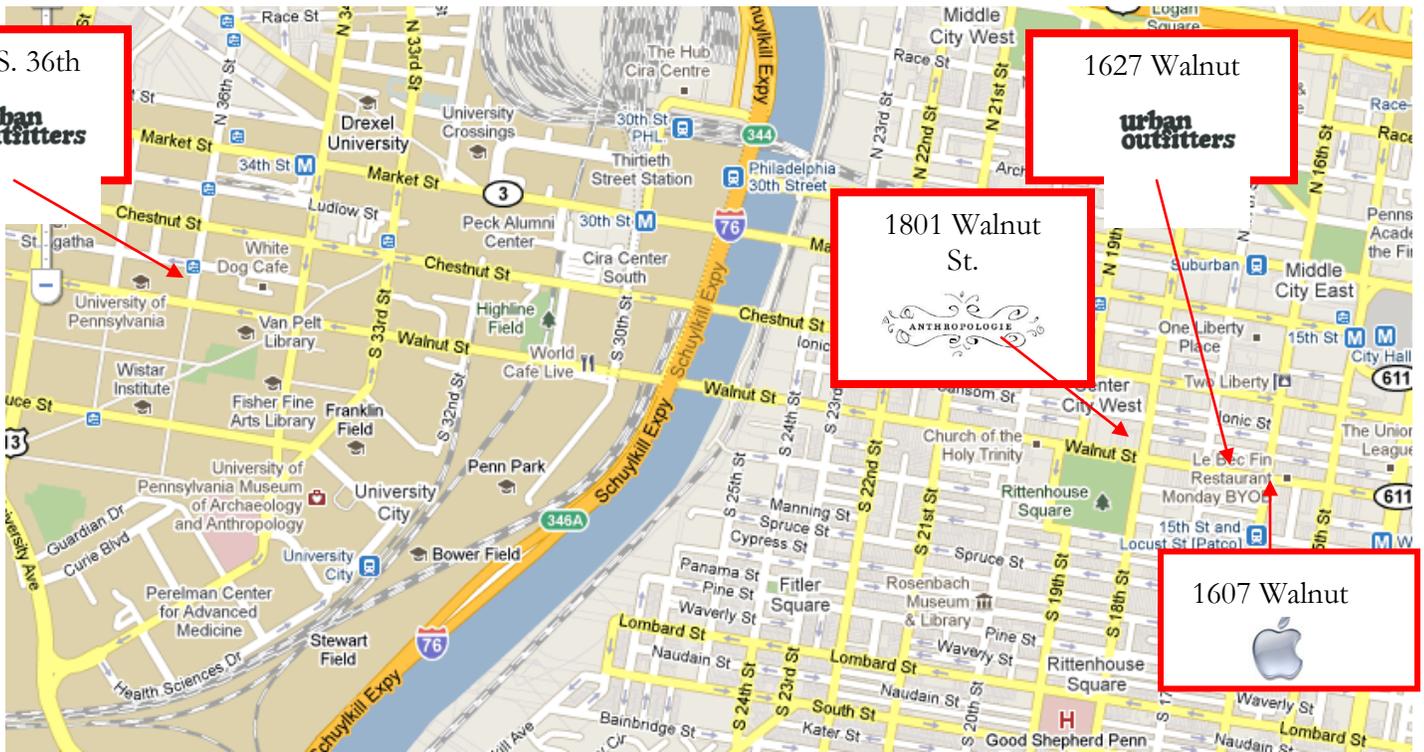
Individual Assignment #4 Mystery Shopping Exercise

Visit the following stores:

- Apple
- Urban Outfitters
- Anthropologie

Behave like a mystery shopper: Observe merchandising, pricing, communication, atmospherics, service, and try to understand the brand's positioning. Based upon your store experience, how would you define the brand in three words? Share your observations about whether and how the brand was effectively communicated through your experience at the store. Write no more than 1 ½ single-spaced pages (less than half a page for each store) about your mystery shopping experience.

This is a map to help you locate the four stores:



Group Assignment #1

Brand Positioning Statement and Perceptual Map

Your group will be turning in a Positioning Statement and Perceptual Map for the brand you are auditing. When considering the optimal positioning for your brand, you will be thinking through and discussing the following questions within your group:

What is the product category? This is usually a set of products or services designed to meet a particular need (or closely related set of needs). Remember that your identification of a product category should be strategic, as the category you choose will help communicate the needs your brand addresses.

What are the available alternatives in the product category? The category should be defined so that these are reasonably close substitutes.

What are the important/relevant attributes that describe and differentiate the available alternatives in the product category? These include physical features and characteristics, product associations, user benefits, etc.

Who are the existing and potential customers for this product category?

How is the market segmented? Start by defining each segment according to needs and/or benefit(s) sought. Which attributes are most important to each segment? It should then be possible to profile these segments using criteria such as demographics, geography, lifestyle, etc.

What is(are) the appropriate target segment(s) for the new product? These need to be evaluated in light of the objectives of the company.

Which of the available alternatives in the product category are most appealing to the target segment(s)?

What are the different strategies one might use to position the new product against the existing alternatives for the target segment(s)? Look for opportunities to establish points of parity (to indicate membership in a particular group of products) and points of difference (to set you apart from that particular group). Some possible positioning strategies are:

- by attribute (one of which might be price/quality)
- by use or application
- according to who uses the product
- in a different product class
- with respect to a competitor

Your group will be turning in a 1-pager that includes 1) a Positioning Statement (with justification) and 2) a Perceptual Map (with justification).

Positioning Statement:

A positioning statement can take many different formats. For it to be effective, it must communicate the objectives of the strategy, including the intended target market, the core benefit proposition of the product/service, and the key point of difference from competitive alternatives. The template below is slightly more specific than that which you completed for your personal brand positioning statement, but both address these key points. Keep in mind that the positioning

Measuring Brand

SUBJECT INSTRUCTIONS FOR THE BRAND PERSONALITY SCALE (Aaker, 1997, *JMR*)

To what degree do the following traits describe brand X (1 = not at all descriptive, 7 = very descriptive)?

Sincerity

down-to-earth
family-oriented
small-town
honest
sincere
real
wholesome
original
cheerful
sentimental
friendly

Excitement

daring
trendy
exciting
spirited
cool
young
imaginative
unique
up to date
independent
contemporary

Sophistication

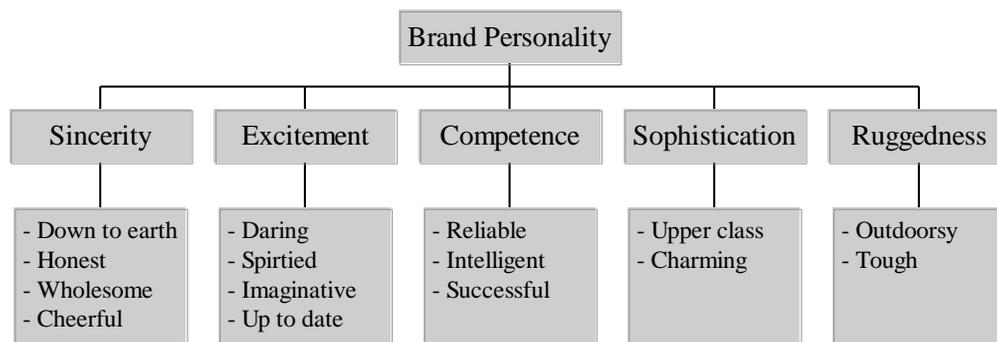
upper class
glamorous
good looking
charming
feminine
smooth

Ruggedness

outdoorsy
masculine
western
tough
rugged

Competence

reliable
hard working
secure
intelligent
technical
corporate
successful
leader
confident



Brand Audit Group Participation Assessment

What percentage of the total amount of work put into your group’s brand audit was contributed by each member of the group? The total amount of work put into the audit includes efforts put into the brand positioning statement, the brand perceptual map, your ethnographic insights, your survey insights, the written audit, and the final presentation.

Name: _____ % contribution: _____

Total: 100%

Do you have any additional comments?