

Case Guidelines and Instructions

Case Studies – Some Thoughts on How to Use Cases

Included in this section are a case study model and two different models for preparing a marketing communications plan (a detailed model and a streamlined model). You may also wish to refer to models in the textbook. There is no right and wrong way of preparing and presenting a marketing communications plan. Select an alternative that is appropriate for your students and your course.

Each of the cases can be completed using the standard **case study format** or by using the **marketing communications plan format**. Refer to both models that are included in this section. Each of these cases has been class tested. They work! Students will quickly identify with the various products and situations and will quickly see how they are marketed in Canada.

*Naturally, cases become outdated as soon as they are written so it is assumed that you will **instruct your students** to conduct appropriate **secondary research** to update essential case facts. Each case provides some data about market size, sales volumes and market shares, but conditions in the marketplace change quickly as new brands, new trends, and other external influences enter the picture.*

Each of the three cases **requires as a minimum** some blend of marketing communications to resolve the problem that is presented. In some cases, specific requirements are stipulated. Advertising will play a role in each case. The Instructor should review each case before hand to ensure it meets your requirements and expectations. You may choose to specify components of the marketing communications mix you would like the students to consider. It's up to you! You have the flexibility to stay focused or grant true freedom to the student to see what unique communications ideas they come up with.

Each case can be used for the purposes of a **written submission** or as a **written submission with presentation**. Since time is always a problem, my preference is for one case to be a written submission using the case study format and another case to be a written submission with a presentation near the end of the course. Personal experience shows that **only one or two cases** can be accommodated in a one-semester course. Three cases are provided for you to choose from.

Special Note:

Please pay attention to the challenge in the **Canadian Tea Challenge Case**. In this case the student (individuals or teams) are to play the role of one of the two competing company brands; either Tetley or Lipton. The case is structured as a competitive situation with both brands wanting to take market share from each other. In this scenario you will be able to evaluate the plans from different competitive viewpoints.

The case studies and the key challenge in each case are as follows:

Case 1 – Red Bull

Red Bull is a mature brand in a saturated energy drink market. They have relied upon buzz marketing strategies to build the brand and have been successful in doing so. New competition from Coca-Cola and Pepsi-Cola, extremely large and resourceful brands, will force Red Bull to re-evaluate its marketing communications practices if the brand is to protect and build its position in this growing market.

Case 2 – Wendy’s Restaurants

Wendy’s shares 2nd place in the Canadian fast food market with Burger King. The company has been floundering ever since the campaign that featured Dave Thomas (the founder of Wendy’s) was terminated. Wendy’s is trying to reposition itself as a higher quality fast food alternative. They have lost their price conscious customers to competitors MacDonald’s and Burger King, both of whom are offering cheaper menus. Numerous campaign ideas have been tried but none have clicked. Wendy’s is looking for a new marketing communications strategy that will build its image and drive traffic to the restaurants.

Case 3 – The Canadian Tea Challenge

Tetley Tea and Lipton (Unilever) dominate the Canadian tea market with several key brands. The tea market is experiencing rapid growth based on the recent success of green tea and specialty tea sales. Both Tetley and Lipton want to build market share and require an “umbrella” campaign (family brand campaign) that will encourage consumers to try their particular brand of tea.

Case Study Model

The following is a **proposed** case study model. Feel free to adapt and modify it to suit your own teaching and learning needs.

When preparing a case solution it is expected that **students will conduct additional secondary research**. The research of good information will enhance the quality of the analysis and the recommendation.

Executive Summary (Written Report Only)

The executive summary should include a concise statement of the problem, a short summary of the major points arising from your analysis, and the major recommendations from your analysis.

Introduction

The decision to include an introduction is left to the discretion of the writer. If it is included, the introduction should be brief and include information regarding the nature of the company, the product, the market, etc.).

Problem

Identify the problem in a clear, concise manner. Ensure that the problem is distinguished from symptoms. Don’t state the problem as a choice between a number of alternative strategies. The problem should pose a question searching for a solution.

Situation Analysis

Most reports include some form of “situation analysis” (often referred to as SWOT analysis). In this stage, it is important that you don’t regurgitate the facts of the case. The reader/listener is only concerned about strengths, weaknesses, opportunities, and threats that have implications for the problem or solution of the problem. Interpretive comments should be provided for strengths, weaknesses, opportunities and threats. Typically, strengths and weaknesses are internal in nature (e.g., corporate objectives, resources, expertise, etc.) while opportunities and threats are external in nature (e.g., competition, market characteristics, technology, social trends, etc.).

Alternatives

Identify a series of alternatives that could resolve the problem. Make sure that issues such as segmentation and targeting, positioning, and the *pros and cons* of each alternative are discussed.

Recommendation

Make a specific recommendation to resolve the problem. Proper justification must accompany the recommendation, and the recommendation must consider company objectives, marketing objectives, and the resources of the company. See the next section for more details.

Summary Plan

Be concise as possible while providing proper detail on the various components of the marketing communications mix you are recommending. Provide details about the following:

1. Marketing Objectives
2. Marketing Communications Objectives
3. Target Market Profile
4. Positioning Strategy Statement

From this point on the content will include specific objectives, strategies, and executions (or appropriate details based on your preferences) for whatever components of the marketing communications mix you are recommending.

5. Marketing Communications Mix
 - Advertising (Creative and Media)
 - Direct Response Communications
 - Online Communications
 - Sales Promotion
 - Public Relations
 - Event Marketing and Sponsorships
 - Personal Selling
6. Timeline for Activities
7. Budget Allocation for Recommended Activities

Marketing Communications Plan Model (A)

The following is a proposed model for completing a marketing communications plan. It has been developed based on Figures 2.7 and 2.11 in Chapter 2 of the textbook. Please adapt it so it meets your own teaching style and needs.

Marketing Background

External Influences

- Economic Trends
- Social and Demographic Trends
- Technology Trends
- Regulatory Trends

Market Analysis

- Market Size and Growth
- Market Segments (Product Classifications)
- Seasonal Analysis

Competitor Analysis

- Market Share Trends
- Marketing / Marketing Communications Strategy Assessment

Target Market Analysis

- Consumer Data
- Brand Loyalty

Product (Brand) Analysis

- Sales Volume Trends
- Market Share Trends
- Marketing / Marketing Communications Assessment
- Image and Reputation

Marketing Communications Plan**Target Market Profile**

- Demographic
- Geographic
- Psychographic
- Behavioural

Positioning Strategy

- Positioning Strategy Statement
- Positioning Grid

Budget

- Budget Available for Plan

Advertising Objectives (whatever is relevant to plan)

- Awareness
- Preference
- Trial
- Usage
- Image

Creative Plan

- Creative Objectives
- Key Benefit Statement
- Support Claims Statement
- Creative Strategy
- Creative Execution

Media Plan

- Media Objectives
- Media Strategy
- Media Execution

*Should any of the **marketing communications mix components** listed below be included in the plan, appropriate objectives, strategies, and execution details will be included for each component.*

Direct Response

Online Communications

Sales Promotion

Public Relations

Event Marketing and Sponsorships

Personal Selling

Media Blocking Chart

- By Media
- By time of year

Calendar for Other IMC Activities

- By Activity
- By time of year

Budget Summary

- Allocation of dollars by various media, activities, time of year, etc.

Alternative Marketing Communications Plan Model (B)
(Streamlined Version)

Market Analysis

- Size and Growth
- Market Segments (and shares of market)

External Influences

- Economic
- Demographic
- Social
- Technology
- Other

Competitor Analysis

(Highlight key aspects of marketing strategy)

- Product (Advantage)
- Price
- Distribution
- IMC
- Image (perceptions held by consumers)

Brand Analysis

(Highlight key aspects of current marketing strategy)

- Product (Advantage)
- Price
- Distribution
- IMC
- Image (perceptions held by consumers)

Target Market Profile

- Demographic
- Geographic
- Psychographic
- Behavioural

Marketing Objectives

- List key objectives that IMC will help achieve

Marketing Communications Objectives

- List key objectives

Positioning Strategy

- Provide a clear positioning strategy statement that will guide the plan and recommendations

IMC Strategy

- Identify IMC components that are recommended along with justification

IMC Execution (Action Plan)

- List all activities, timing, location, cost details (accurate budgets are essential)
- Blocking Chart (1-page summary calendar showing the timing of all activities)
- Budget Summary ((by IMC activity)