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2005 Educators' Conference Proceedings**

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ACKNOWLEDGMENTS

Marketing Management Association Educators' Conference September 24–27, 2005, Kansas City, Missouri

We are grateful for the financial support provided to the conference by our co-sponsors, McGraw-Hill/Irwin and South-Western/Thomson Learning. We also appreciate the time and effort expended by the 2005 Program Committee in order to make this year's program successful: John Cherry, Michelle Kunz, Marie Steinhoff, and Judy Wiles. The Harrison College of Business, Southeast Missouri State University continues to provide support to this conference and we are grateful for their participation. Finally, we greatly appreciate all those who are participating in this year's conference as presenters and participants; thank you! Founded by Peter Gordon ten years ago, the primary focus of the Fall Educators' Conference has been and continues to be to enhance the quality of teaching in all business disciplines in an informal atmosphere, conducive to discussion.

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CONSIDERING “CLICKERS” FOR CLASS?

Michelle B. Kunz, Morehead State University

By now just about everyone has heard about the classroom “clicker.” More correctly, it is the use of an Immediate Response System in the classroom. However, just about everyone refers to the technology as “clickers,” probably because the response pads look very much like a remote. I will admit that the technology isn’t the “magic bullet” that will make class a sure fire success, but for the most part, my experience has been positive in the classes that I’ve used the technology. There are considerations you should make, and both positive and negative aspects of the systems. Below I’ll list both sides for your consideration.

Benefits:

1. Fun Factor: Students like it!! They feel they are more engaged in class.
2. Quick Way To: Take attendance; assess topic comprehension, anonymous surveys.
3. Self-assessment: Allows students to compare with their peers.
4. Group Activities: good for collaboration, and team decision exercises.
5. Quizzing: pre- and post-lecture quizzing.
6. Pre-developed content: many publishers provide content and fun games, such as Jeopardy.

Hurdles:

1. Prep Time: you can’t just walk in and run new technology without preparing first.
2. Hardware Setup: may be simple, but may require room design considerations, etc.
3. Added Cost: on average it adds between \$20-30 to the cost of the class. Easiest if bundled as a package with the textbook.
4. Lost & Malfunctioning Clickers: it’s really best to have several “backup” clickers; students leave them in the car; clickers do fail and have to reset or replaced.
5. Initial Class Setup: it takes about two weeks into the term before students are all registered, have the clickers and are truly ready to go.

There are several systems available, and I have used two: CPS (Classroom Performance System) from eInstruction (<http://www.einstruction.com>) and TurningPoint from Turning Technologies (<http://www.turningtechnologies.com>). Both systems have strengths and weaknesses. Both used IR (infrared) signals, but newer systems are using

RF (radio frequency) which is purported to be more reliable, with faster response times, and no line-of-sight restrictions to the receiver. A third source I recently found online is Beyond Question, by Smartroom Learning Solutions, Inc. (<http://www.smartroom.com>.) This system also used IR technology.

Just as PowerPoint is NO replacement for the professor, only a tool the professor can use in class, the “clicker” won’t make you class the “magic pill” for students’ success. However, this technology, just as other multimedia technologies is another tool in our arsenal to consider as we develop and revise our classes and instruction methodologies.

My Student Survey Response Comments:

- ◆ I like this form of attendance and quizzes.
- ◆ I enjoy using the new technology.
- ◆ I feel that CPS is a good addition to the classroom.
- ◆ I enjoy it; it helps me prepare for the tests.
- ◆ CPS is handy, and makes class a bit more fun.
- ◆ I like being able to see right away how I did on the quiz.
- ◆ I love the clicker; it makes class more fun.
- ◆ Good addition to the classroom because it does engage students in activities
 - ◆ more interesting than regular quizzes.
- ◆ I like it and hope it is used in many other classes I take at MSU.
- ◆ I think it’s a cool way to interact in class activities.
- ◆ I didn’t think I would like, but I’ve become used to it.
- ◆ Kind of like playing trivia or something at a sports bar.
- ◆ The clickers regularly fail
 - ◆ some students unable to concentrate on the answers.
 - ◆ More reliable forms of technology,
 - ◆ student response keypads that do not malfunction as often, would be much better.

As you can see, not everyone was completely sold on the technology, but for the most part, the large majority of the students (70%+) responded favorably to the technology. I have listed some recent news items making the press below:

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Michelle B. Kunz
Morehead State University
150 University Blvd.
UPO 526
Morehead, KY 40351-1689
E-Mail: m.kunz@morehead-st.edu

IMMEDIATE FEEDBACK ASSESSMENT TECHNIQUE (IF-AT): ENHANCING COLLABORATIVE LEARNING WHILE PROVIDING IMMEDIATE FEEDBACK

Rama Yelkur, University of Wisconsin – Eau Claire

Instructional faculty face several challenges in today's teaching environment. All of us, at one point or the other have debated whether to keep teaching the way we have taught for years or to learn how to adapt our teaching styles to a new generation of students. In the past three decades, university instructors have been experimenting with alternative approaches to active, experiential, and collaborative learning. Today's students learn differently, they are easily bored with regular lectures. They also need instant gratification, which, in the classroom, translates to giving them immediate feedback. We are all constantly bombarded with questions from students such as, "when do we get our exam grades back?" or "when will our papers be graded?" There are several techniques that have been used to address the issue of "instant gratification." Objective style quizzes where the instructor provides the answers immediately after quiz is taken, in-class assignments graded immediately by peers, and in-class pair-share activities that are immediately graded are some examples of how this issue has been addressed in recent years. The question is, do these activities and assignments that provide instant feedback to students really enhance learning and motivate students to study?

Collaborative learning is a component in all my classes, both undergraduate and graduate. My courses include several group assignments and usually a major group project that students work in teams of four or five. In order to avoid the common problem associated with group activities – "free riders" – I always incorporate individual accountability into my assignments and also include tools and techniques to motivate groups to engage in a great deal of discussion. Last but not the least, it is also important to provide group members with immediate and meaningful feedback.

My role is as the facilitator of learning in the classroom. Student learning is significantly impacted by the various processes used in the classroom. . . . My objective as a facilitator is to continuously improve student learning by using an assortment of processes. In order to accomplish

this, my specific goals are: to enhance interactions between students, to enhance interactions between instructor and students, provide a variety of opportunities for both active and collaborative learning, and to motivate students to learn by providing immediate feedback on as many in-class activities as possible. I have been using the Immediate Feedback Assessment Technique (IF-AT) in my classes for the past year. IF-AT is a good fit with my goals because it helps in providing immediate feedback while motivating students to learn.

What is Immediate Feedback Assessment Technique (IF-AT)?

"The IF-AT uses a multiple-choice answer sheet with a thin opaque film covering the answer options. Instead of using a pencil to fill in a circle, students scratch off their answers as if they were scratching a lottery ticket. The student scratches off the coating of the rectangle corresponding with the first-choice answer. If the answer is correct, a star or other symbol appears somewhere within the rectangle. The student's learning is immediately re-enforced, and the student receives full credit for the answer. If incorrect, the student must re-read the question and remaining answer options and scratch off a second or even third choice until the correct answer is identified. Students will earn partial credit for multiple attempts and learn the correct response for each question while taking the test" (Epstein Educational Enterprises).

In my classes, students take an objective/multiple choice exam or a quiz individually first. Immediately following this, they take the same exam in their respective groups using the IF-AT form as their answer key. The difference between the individual and group exam is that, the group gets to see the correct answers as they complete the exam because of using the IF-AT form and the group is given more than one chance to identify the correct answer. See Figure 1 for a sample form.

FIGURE 1
Sample IF-AT Form

IMMEDIATE FEEDBACK ASSESSMENT TECHNIQUE (IF AT®)

Name _____ Test # _____
 Subject _____ Total _____

SCRATCH OFF COVERING TO EXPOSE ANSWER

	A	B	C	D	Score
1.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
2.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
3.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
4.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
5.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
6.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
7.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
8.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____

The Impact of IF-AT in My Classes

I have used the Immediate Feedback Assessment Technique in both my undergraduate and graduate classes and have found the outcome to be extremely gratifying to both myself and the students. From an instructional perspective, it is rewarding to see students actually study and understand the material and explain it to their fellow classmates. This is a sign of true learning, when students

are able to teach other students. They engage in meaningful discussions with each other in the process of taking the exam in their groups, because, every team member's grade is at stake.

Students have actually referred to my exams as "fun." They have commented to other instructors that they are motivated to study because they are accountable to their group. I believe that IF-AT has helped me provide students with a new perspective on academic testing. They are inclined to involve themselves in "analytical" learning rather than in rote memorization because they are required to justify their answers to other team members.

Concluding Remarks

There are a few limitations in using this technique, but most are not difficult to overcome. The IF-AT form comes in a limited number of formats. For example, one may have a choice between a 25 question form and a 50 question form. A form may come with four answer choices per question or five answer choices per question. One can certainly use the form for a fewer number of questions for a given exam or a quiz. If the number of questions on an exam exceeds 50, one can combine two or more forms. There are a variety of answer keys available for each type of IF-AT form, but the instructor has to write questions to match the answer key or revise an existing exam to match the answer key, which takes time, but is not a major limitation. When IF-AT was first developed, the star or other symbol that appears within the rectangle was placed in the same position for every rectangle, which resulted in some student cheating. In the latest IF-AT forms, however, the star is randomly placed in different positions within each rectangle, resolving this problem. Overall, I would highly recommend using this technique in your classes.

Rama Yelkur
 University of Wisconsin – Eau Claire
 P.O. Box 4004
 Eau Claire, WI 54702-4004
 Phone: 715.836.4674
 FAX: 715.836.2944
 E-Mail: yelkurr@uwec.edu

BALANCING THEORY AND PRACTICE IN INTERNATIONAL MARKETING: THE CASE OF THE GLOBAL MARKETING MANAGEMENT SYSTEM ONLINE (GMMSO)© (www.gmmso2.com)

Basil J. Janavaras, Minnesota State University

PROJECT OBJECTIVES

1. Give the students the opportunity to develop a global strategic plan online by integrating all functional business areas with key environmental forces impacting on the firm's ability to operate around the world.
2. Expose the students to online international sources of information and research consisting of lead edge web sites and databases.
3. Allow the students to integrate technology into the classroom by completing the GMMSO project online and make a power point presentation.

Project Assignment

Develop an international marketing plan using the Global Marketing Management System Online software.

Instructions:

1. You must Register individually online and pay a fee in the amount of US\$35.00 via a credit card (Visa, Master Card). To register and to begin working on the project, do the following:
 - ◆ Enter: <http://www.gmmso2.com>. **Click on Register, click on Student, fill out the form completely and click on Submit (Click on Credit as your Method of Payment and provide all necessary information-- The system is secured). All the information you enter is completely confidential.** You will be able to access the system using your username and password **after you have been activated** (less than 24 hours from registration).
2. **Getting Started: You can start working on the project by clicking on Phase 1.1.** Select an industry; select the company and the company's product/service you would like to work on for your project.

Suggestion: Before you start working on the project, read the Instructions carefully, review the Sample Cases and visit the Resources.

3. Project Proposal Phase (1.1a-1.1e) due (date): Select an industry, company and product/service you would like to work on for your class project (Phase 1.1.a-1.1.e). Submit proposal and secure instructor's approval by (date). The instructor will review your proposal online and contact you with comments.
 - ◆ The Project Proposal consists of the following: (Phase 1, Internal Analysis, 1.1.a-1.1.e):
 - Industry Selection (It is your choice).
 - Company Selection (An existing company within the selected Industry or create a new company/product/service, the company can be headquartered anywhere in the world (It is your choice).
 - 1.1a Background
 - 1.1b Mission Statement
 - 1.1c Sales and profits for the last three years
 - 1.1d Product lines/services
 - 1.1e Strategies

NOTE: The instructor will review the Project Proposal Online along with the four GMMSO phases. Therefore, there is NO need to submit a separate written report on the proposal and Phase 1-4. However, the Final Term Paper must be submitted in writing. See due dates and format below).

4. **Phase 1 & 2 (due date)**
5. **Phase 3 & 4 due. . .**
6. **Final Term Paper and PP presentation (due date)**
 - ◆ **Format:** Follow the gmmso2 format in writing your report and developing your PP presentation. All papers will be double spaced and type-written with appropriate graphs and charts. Your

paper is expected to be free of grammar and syntax errors. Do not submit it in a 3 ring binder. It must be spiral bound.

2. Go online and conduct a situation analysis of a company, identify high potential country markets based on macro, micro, and market accessibility variables, perform an in-depth analysis and evaluation of selected markets and develop an international and local business/marketing plan.
3. Complete the project online using targeted web sites and databases and work with Word, Excel and Power Point.

Outcomes Assessment

Students should be able to:

1. Integrate functional business areas such as Marketing, Management, Finance and HR within a global context online.

PHASE 1 Situation Analysis							Phase 1 Report
1.1	1.2	1.3	1.4	1.5	1.6	1.7	
Company Analysis	Intl Involvement	Industry Analysis	Target Mrkt Profile	Product Profile	Global Readiness	S.W.O.T.	
PHASE 2 Country Selection							Phase 2 Report
2.1	2.2	2.3	2.4				
Country Selection	Macro Screening	Market Accessibility	Micro Screening				
PHASE 3 In-Depth Market Analysis							Phase 3 Report
3.1	3.2	3.3	3.4	3.5			
Contacts and Competitive Analysis	Country Market & Company Sales Potential	Market Entry	Market Channel Structures	Best Target Market Country			
PHASE 4 Entry Strategy & Marketing Plan							Phase 4 Report
4.1	4.2	4.3	4.4	4.5	4.6	4.7	
Entry Mode	Market Segmentation	Sales, Profits, & Market Penetration	Pricing Strategy & Plan	Promotion Strategy & Plan	Distribution Strategy & Plan	Budgeting	
©2003 Global Marketing Management System Online							

ISSUES

Content
Process
Pedagogy
Administration
Technical support
Costs

An Overview of the GMMSO©(www.gmmso2.com)

The GMMSO is designed to help students to systematically conduct a company situation analysis, identify countries with high market potential for selected products/services, conduct a competitive analysis, select the best country market, determine best entry mode strategy, and develop the marketing plan.

Executive Summary

Based on Phase 1–4 analysis and evaluation, you can prepare an Executive Summary consisting of:

1. The purpose of your project.
2. Your research approach.
3. Your key findings.
4. Your conclusions and recommendations.

To register as an Instructor, FREE of Charge, enter <http://www.gmmso2.com> or <http://www.janavaras.com>.

Basil J. Janavaras
Dept. of Marketing and IB
Minnesota State University
Mankato, MN 56001
Phone: 507.389.5346
E-Mail: basil.janavaras@mnsu.edu

MARKETING DISTRIBUTION PEDAGOGY ON ADVANCED TECHNOLOGIES SUCH AS RADIO FREQUENCY I.D. SHOULD FOCUS ON THE PRAGMATIC TRANSITION ISSUES

James Ricks, Southeast Missouri State University
Dana Schwieger, Southeast Missouri State University
C. "Raj" Somarajan, Southeast Missouri State University

Radio Frequency Identification (RFID) is the generic term for technologies using radio waves to automatically identify people or objects. The technology is applied similar to barcodes but considered superior because it doesn't require a direct line of vision to complete a scan. Some examples of RFID technology in use include E-Z Pass toll collections on toll roads and keyless remotes for starting and unlocking automobiles. There are two types of tags, passive and active. These tags have built-in antennas that allow them to receive and respond to queries from a transceiver. Passive tags require no power. They receive their power from the energy that is created by incoming radio frequency signals sent from the transceiver. Wal-Mart and the U.S. Department of Defense have both placed requirements on their vendors to use RFID tags to improve supply chain management. These tags are also being used for inventory management.

It would not be inappropriate for educators to indicate that these technologies will greatly improve efficiencies and therefore should be implemented throughout the distribution system. Promoters describe a supply chain where all assets are in perfect visibility via RFID through production, distribution, retail and consumption. According to one analyst, the world will need about half the warehouse space it needs today (Twist 2005). The technology is compelling, but educators should emphasize that there are serious near-term transition problems. Clearly the value of the instruction would be enhanced if coupled with a pragmatic view of the implementation challenges. Educators who can delineate the issues involved will help prepare both students and industry for the transition.

Determining the point at which utilizing RFID technology will provide sufficient value to justify the associated costs is not a straightforward calculation. Consideration needs to be made not only for the technology, training

and associated costs of implementation, but also for the additional costs generated by the influx of new data. The decision becomes one of determining the economic value provided to operations by the additional technology and information collected rather than the technology alone.

As research and technology advances, RFID chips and associated technology costs continue to decline. Developments in polymer-based technologies allow for the chips to be constructed out of plastic material which will eventually bring the costs down to less than a cent each. In addition, the adoption of the Electronic Product Code Generation 2 (EPC Gen 2) standards will be able to decrease multinational corporation costs and concerns regarding country-specific RFID tags. Not only do the EPC Gen 2 standards support global interoperability, but they also provide for tag reuse, further decreasing the overall financial costs of RFID technology (Baljko 2005). Thus, with the declining costs and increasing capabilities of the technology, organizations considering implementing RFID's will be prohibited not by financial constraints but by the overall value of the technology's application.

In calculating the expected informational value of RFID technology, each organization needs to determine the level of detail that they wish to collect from their RFID implementation (Prause 2005). Although end-item tagging is effective when a particular batch of products needs to be traced down due to production defects, the amount of data events generated by those individual product tags may be more than the organization can handle. The amount of data to be collected will be determined in part by the capabilities of the database and data collection tools as well as the expected usage of the collected data. The value generated by the information provided by the reports needs to be compared to the costs of obtaining that level of information.

Educators can help future supply chain managers realize the value of implementing new technologies in distribution management through identifying the areas of possible savings and efficiencies that can be realized. This information can, in turn, help better determine the optimal point at which it is advantageous to transition into a full RFID implementation. Further, educators can also help students and firms examine the costs associated with not transitioning into the latest technology at the appropriate time.

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James Ricks
Department of Management and Marketing
Southeast Missouri State University
Cape Girardeau, MO 63701
Phone: 573.651.2920
FAX: 573.651.2909
E-Mail: jricks@semo.edu

Dana Schwieger
Department of Accounting and MIS
Southeast Missouri State University
Cape Girardeau, MO 63701
E-Mail: dschwieger@semo.edu

C. "Raj" Somarajan
Department of Accounting and MIS
Southeast Missouri State University
Cape Girardeau, MO 63701
E-Mail: csomarajan@semo.edu

FOCUSING THE EFFORTS OF AN ASSISTANT MARKETING PROFESSOR: RECOMMENDATIONS FOR SUCCESSFUL CAREER ADVANCEMENT

Tim Aurand, Northern Illinois University

ABSTRACT

Pressure to conduct research, excel in the classroom, serve on committees, and more can prove daunting for even the best trained assistant professors. This paper identifies obstacles that await new marketing faculty and presents an appropriate acronym based outline of the steps that can be taken to help them meet their goal of gaining tenure and promotion to the rank of associate professor.

INTRODUCTION

Obtaining tenure and the rank of associate professor, the primary goal of most junior faculty, is no simple task. Newly hired faculty typically must balance a wide variety of responsibilities including teaching, research, service, counseling, and in some cases, grant writing and consulting (Boyer and Cockriel 2001). For many junior faculty members, family and personal obligations can also compromise the time devoted to the pursuit of tenure. The dream of a professional life consisting of “treasured hours of scholarly contemplation” (Greene 2004, p. 20) can quickly be replaced with stress-filled days laden with concern over teaching evaluations, department politics, and research progress. A successful path to tenure and promotion requires a detailed plan, diligence, discipline, and perseverance to successfully navigate through the tenure process.

While the rigors of a Ph.D. program bring many challenges that mirror those found in the first few years on a tenure track, many new Ph.Ds. are not completely prepared for their first professional assignment. Life “on the other side of the desk” can be filled with opportunities and obstacles that can dramatically impact career progression. Unfortunately, new assistant professors are all too often left to your own resources to plot a course through an academic jungle of department and college politics, vague and often changing tenure requirements, demanding administrators, colleagues, and students.

While aspiring to higher ranks within academia, you may carve out a niche for yourself that you would not trade for anything (Greene 2004). The freedom associated with a tenured position is itself the goal set for many academics. The ability to set your own pace and maintain a certain intellectual freedom is not necessarily fostered in the practitioner’s world, governed by a corporate structure, investors, and analysts, and is to many, well worth the rigors associated with gaining tenure (Greene 2004).

A universal concept among colleges and universities is that three primary factors contribute toward gaining tenure: research, teaching, and service. How these three are ranked in importance depends a great deal upon the primary focus of the college or university at which you are employed. Singell (1996) finds that faculty at premier universities spend more time with research initiatives than do their peers at liberal arts institutions. It is obviously important to have a clear understanding of the specific research requirements expected at your institution.

While the Association to Advance Collegiate Schools of Business (AACSB) allows schools to opt for a teaching orientation, few schools can afford to do without the funding and prestige that come from high-quality research projects. You would be unwise to base your case for tenure and promotion solely on outstanding teaching efforts because promotion and tenure involves judgment from college and university-wide committees and administrators, many of whom place a great deal of emphasis on publishing the external rewards associated with it (Dulek 1992). However, the means by which you get published is significantly different from your dissertation experience. As a Ph.D. candidate you may start out doing research primarily by yourself while under the watchful eye of a dissertation chair and committee. But once hired and on the tenure track, the focus typically switches to “collaboration with peers” – a process significantly different from that learned in a doctoral program. Collaboration is mutually beneficial in that you get the benefit of wisdom and

TABLE 1 How Faculty Spend Their Time			
Type of Institution	Research	Teaching	Service/Other
Premier University	33%	46%	21%
Liberal Arts	10%	68%	22%
*Source – Singell 1996			

experience of senior faculty members, while the senior faculty member gets the benefit of your energy (Green 2004) and a newer perspective on the state of research. In any case, collegial interaction with regards to research is critical (Demski 2000).

Perhaps as an unexpected result of the publishing pressure applied to junior faculty, publishing productivity of U.S. marketing academics at the associate professor level declines substantially once tenure and promotion are achieved, but then increases with the full professor role. Research by Polonsky et al. (2003) finds that assistant professors publish, on average, 1.93 articles per year; associate professors 0.97, and full professors 1.57. So for the junior faculty member seeking tenure and promotion, the directive should be quite clear – learn to publish, and publish quickly with the guidance and assistance of senior faculty.

Faced with a plethora of internal and external challenges, you may be searching for guidance that will assist you in your quest for tenure and promotion. With this in mind, the following guide has been developed with the hopes that it will help guide you in your academic pursuits.

KEY ELEMENTS OF SUCCESSFUL CAREER ADVANCEMENT

The “Associate Professor” model is based primarily upon the personal experiences of the authors and those of their peers at a regional university in the Midwestern United States. The model itself stems from the very goal that the vast majority of junior marketing faculty seek: tenure and promotion to the rank of associate professor. With the pressures you will face in mind, the following suggestions are organized in a way that you, as an assistant professor, might appreciate. The goal is literally spelled out with each letter serving as a facet of the path from assistant to associate professor revealed.

Guideline to Associate Professor

- A** Adapt to the new environment
- S** Set goals
- S** Say no to opportunities that distract from formal publishing goals
- O** Offer your expertise to colleagues
- C** Connect with a mentor
- I** Identify decision makers
- A** Anticipate problems
- T** Track progress
- E** Explore your personal potential
- P** Prioritize, publish, and publish some more
- R** Recognize colleagues
- O** Optimize time in the office
- F** Follow personnel committee and department chair recommendations
- E** Engage colleagues
- S** Seek feedback from students and faculty members
- S** Sell yourself
- O** Overcome personal barriers
- R** Realize how good life can be

EXPLANATION OF GUIDELINE ELEMENTS

The following explanations summarize each element of the “Associate Professor Guideline”. It should be remembered that every university, college, and department represents a unique working environment. The following guideline is reflective of the experiences of tenured and tenure track professors at a typical regional, state university.

A – Adapt to the New Environment

The role of an assistant professor is dramatically different from that of a doctoral candidate. As a new faculty member, it is imperative that you quickly learn what is expected in your new role within your particular department and college, and from multiple perspectives (e.g.,

your department chair, your promotion and tenure committee members, senior faculty, and other junior faculty members that have more experience on how the department works). Because individual responsibilities and expectations can change considerably from one year to the next, regular formal and informal meetings with the department chair and personnel committee to clarify the level of performance and deliverables that are expected in both the short and long term can be extremely beneficial to you, if not essential.

S – Set Goals

Taking personal interest and aspirations into account, measurable short and long term goals should be established and agreed upon with your department chair and personnel committee. Placing these written goals in a visible place in your office can serve as a regular reminder of where your priorities should be and can help in keeping you focused on the most important tasks. By identifying related tasks that in conjunction serve in the accomplishment of the goal, you can better track your progression toward the ultimate goal of tenure and promotion.

S – Say No to Opportunities That Distract from Formal Publishing Goals

Few professions offer the variety of service, writing, consulting, counseling, etc. opportunities that can distract from the tasks crucial to the accomplishment of primary goals. Assistant professors must become adept at politely declining to take part in projects or activities that divert energy from research, the classroom, and required service activities. It must be remembered that most “distractive” opportunities will resurface and can be more readily pursued once tenure has been granted, but without tenure, such activities may not be viable.

O – Offer Your Expertise to Colleagues

As a junior faculty member, you have an area of expertise that typically complements those of your colleagues. This may even be one reason that you were hired instead of another candidate. Make it a point to identify your unique skill sets, and then offer these skill sets to your colleagues in their own research initiatives. By offering valuable contributions to colleagues you can quickly establish yourself as a valuable departmental asset.

C – Connect with a Mentor

It is becoming more common for marketing departments to offer formal mentoring programs for junior faculty. Whether or not such a formal mentoring program is available, it would behoove you to seek out a mentor with

an established publishing history and strong departmental ties. Learning the intricacies of publishing, teaching, and even academic politics from a seasoned professional can prove to be critical to your career progression. Much like good advisors or dissertation committee members, a mentor can dramatically reduce the amount of time it can take to get an article published, make you aware of potentially dangerous political potholes, and offer guidance and insight into the characteristics unique to the university’s student body. A mentor can also serve as your spokesperson or champion regarding issues surrounding tenure and promotion.

I – Identify Decision Makers

Much like professional selling, it is important that junior faculty quickly identify colleagues and peers who hold the ultimate responsibility for making decisions regarding tenure and promotion. It should be noted that these individuals are not always those who are on the department and college personnel committees. In cases where tenure and promotion decisions are based upon relatively vague criteria, it is imperative that you learn as much as conceivably possible regarding these criteria from the decision makers themselves so that they can be incorporated into your personal goals.

A – Anticipate Problems

Very few academics can progress through the ranks of tenure and promotion without encountering problems along the way. You are likely to face rejected papers, committees that require more work than you anticipated, students with challenging academic and personal issues, and “non-responsive” classes. While many of these issues occur unexpectedly, you would be wise to prepare in advance for these situations. Much like contingency planning in the business sector, planning and preparing for unexpected, and perhaps unfortunate, issues provide you with a better chance of overcoming these obstacles quickly and with a less significant impact on their career progression.

T – Track Progress

You should know at any given time the number of articles you have published, the number under review, the number in revision, and the number “in process.” You should also have class evaluations readily available, know the status of the committees you are serving on, and know at precisely what you should be working on in order to accomplish your next task and goal. Only by tracking progress can you hope to stay on track toward the ultimate goal of tenure and promotion.

E – Explore Your Personal Potential

The freedom associated with being a college professor allows you to maximize your potential in a way few other vocations do. The life of an academic can be extremely rewarding. And while many professors consider it their primary goal to help students in their development process, you will be remiss if you do not see the potential to take advantage of your intellectually vibrant and resource-rich setting, and personally grow beyond any self-perceived intellectual and interpersonal limitations.

P – Prioritize, Publish, and Publish Some More

Prioritizing begins with determining which aspects of your work are urgent, important, and trivial (Gray 2005). While publishing is typically the most important, it tends to receive strong competition from everyday tasks that appear urgent. Keep in mind that “publish or perish” is the operative phrase for most academics and represents a primary consideration when you seek tenure. It is imperative that you know the specific number and quality of publications required in order to obtain tenure, and work steadfastly toward exceeding the goal. Find out if your department recognizes or favors different publication outlets than your degree-granting school. Take the time to learn from your departmental colleagues *how* to publish in the way that will lead to your success. Think of yourself as an intellectual entrepreneur with a high level of freedom and a wide spectrum of responsibilities.

R – Recognize Colleagues

It is important that you recognize those who have been instrumental in your career progression. Senior faculty members regularly offer their guidance and support while taking time away from their own responsibilities. Their insight can be instrumental in a junior faculty member’s matriculation through the academic ranks. Even a simple, informal recognition of your senior colleagues’ status and accomplishments can be extremely well received and often times professionally rewarding.

O – Optimize Time in the Office

While an argument can be made for the efficiencies associated with working out of your home or home office, there are a number of advantages inherent to doing as much work as possible at the university. Being available for impromptu meetings, addressing new and existing research opportunities, being available for students outside of regular office hours, being visible to colleagues and others who may be instrumental in your tenure process, and simply being away from family and other distractions commonly found in the home can all in their own way enhance the chances for a successful tenure vote.

You should also expect to encounter many days, however, when you must protect your time and creatively find an optimal setting in which to write or grade with minimal distraction.

F – Follow Personnel Committee and Department Chair Recommendations

Once clear advice is procured from the personnel committee and the department chair, you would be well advised to follow it. Much like a dissertation committee, a personnel committee and the department chair expect a junior faculty member to adhere to the advice and guidance that is provided. You should make it a point to document the directives that are provided, confirm your understanding of these suggestions and provide the committee members and chair with regular, even non-solicited, progress updates.

E – Engage Colleagues

Junior faculty bring with them a host of new ideas, research and statistical techniques, and insights that department members sincerely appreciate. By going to colleagues with new research ideas, data, or simply an open mind and willingness to be of assistance with existing endeavors, you make yourself a more integral part of the overall success and growth of the department and are more likely to be seen as a vital contributor to overall departmental goals.

S – Seek Feedback from Students and Faculty Members

If you hope to adequately track your performance, it is important to have regular input from students and faculty members regarding your performances to date. Most junior faculty members are expected to demonstrate steady signs of improvement while serving their respective universities as assistant professors. You cannot expect to improve significantly if you do not know specifically which performance aspects to address. By accepting constructive criticism as a simple gauge by which existing performance is measured, you can dramatically enhance your efforts and your chances for a positive tenure decision. Learn to view honest feedback from a trusted colleague as your best source of information.

S – Sell Yourself

You should be willing and able to sell yourself and your capabilities to their colleagues. Much like salespeople and other marketers in the corporate world must be able to sell themselves, their products, and their services, junior faculty must be confident in their abilities and be able to demonstrate how they can augment their department and

its efforts to provide quality education and produce quality research. While selling yourself may prove difficult, it is a skill that is virtually essential if you hope to have a successful career at a well-established university.

O – Overcome Personal Barriers

As a junior faculty member, you are unique in your own abilities. Even within the area of publishing there are those who are more comfortable with instrument design and data collection, those with statistical analysis, and those with writing. You must understand first that you are not alone at the university and that your skill sets compliment the skill sets of their peers. You should also be aware, however, that over time you may be expected to address your weaknesses, be they in the classroom, with research, or with committees, if you hope to become the well-rounded professor that most universities seek among their tenured faculty.

R – Realize How Good Life Can be

Few professions offer the degree of freedom, intellectual stimulation, camaraderie, job security (post tenure), vacation time, and opportunity for outside income than does that of a marketing professor. Very few tenured marketing professors move into, or back into, the private sector to practice sales and/or marketing. In most cases, the role of the assistant professor is very similar to that of an associate professor . . . albeit with just a bit less job security and possibly fewer committee assignments. In other words, you should consider yourself to be extremely fortunate to have a job that is so rewarding. You would be remiss if you did not treasure each day on the job and be thankful for such a wonderful opportunity.

CONCLUSION

While there are few guarantees in academia, failing to publish to your department's level of expectations will typically serve as a "ticket out" of the university. By diligently focusing your energy on publishing, tracking performance, and professionally collaborating with senior faculty you can significantly enhance your chances of being granted tenure and promotion. Once achieved, the position of associate professor brings with it professional freedom and job security virtually unheard of in any other field. Implementing the "Associate Professor" model can assist you with your career aspirations and help you achieve your professional goals and the enviable position of tenured faculty.

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Timothy W. Aurand
Northern Illinois University
DeKalb, IL 60115
Phone: 815.753.6231
FAX: 815.753.6014
E-Mail: taurand@niu.edu

BALANCING THE WORKLOAD: MEETING TEACHING, RESEARCH AND SERVICE EXPECTATIONS

Julie F. Toner, Bellarmine University

INTRODUCTION

Think of preparing for tenure and promotion (or relocation to another job at another university) as preparing a marketing plan. Understand your target market! Very quickly you need to understand what your target market values. Is it teaching? Is it research? Is it service? Is it some kind of balance between two or three of these? Also, understand how your target market may or may not change before you submit your portfolio for review. For instance, is the chair of the promotion and tenure committee about to retire? How likely is it that your department chair, dean and provost will still be in their positions by the time that you submit your portfolio? You need to start talking with your colleagues very early in the process. Ask to see their successful portfolios. Learn what happened to the people who didn't "make it" in the past. Once you know the expectations of your colleagues, you will want to set goals for yourself in each of the three areas of teaching, research and service. I would recommend goals that are above the minimum for each of the three areas. You don't want to be perceived as just squeaking by. In addition, if you don't quite make one of your "above minimum" goals you will still have made it to the minimum. Finally, I would also recommend finding at least one mentor. Each time that you have a decision to make concerning your career, run it by your mentor(s).

Teaching

Understand exactly what is expected in the area of teaching. Is your evaluation based on course evaluations by students/rumors/analysis of written materials you have prepared/peers watching you/or perhaps a teaching award or two? Some schools will expect excellent teaching above everything else. It wouldn't matter if you had 17 journal articles if you were a poor teacher. At other schools, you could be promoted early for your 17 journal articles even though you are a poor teacher. My other advice would be to show continuous improvement in your teaching. Do an "unofficial" mid-term evaluation of the course and show how you improved. Another way to show continuous improvement would be to take a comment on your student evaluations and make a change the

next semester based on that comment. Attending teaching conferences or writing about pedagogy may also be important at some schools. Keep copious records pertaining to your teaching. Items to save include: syllabi, course evaluations, exams, projects, emails from students, letters of reference you have written for students, and grade distributions. If you have a particularly good or particularly bad class, be sure to write a narrative concerning this before you leave for the semester. The most important thing to remember about teaching is to know what the expectations are and then to exceed those expectations. Since so many schools have poor evaluation systems in place to judge teaching, be prepared to "prove" that you are a good teacher.

Research

More and more schools have increasing expectations for research. Be prepared for the "rules" to change during your probationary period. I would recommend that you choose one conference to attend (and present a refereed paper) each and every year. You will get to know a lot of people on a meaningful basis. These same people can write letters of recommendation for you when it is time for tenure and promotion. I would also recommend that you attend one other conference each year to learn something new and meet new people. In terms of tenure, many schools are looking for quantity. You need, however, to be careful about this at other schools. Some schools will also be very specific about quality. Again, know your target market. In terms of promotion, almost all schools are looking at quality. I would recommend that you carve out a niche for yourself and publish about one referred article a year in your specific area. You will also want to know the rules your target market has concerning co-authoring articles. Until you are a tenured full professor, I would recommend that you have at least one journal article under review and another one that you are working on at all times.

Service

At most schools service is the least important of the three activities. That being said, service can still be a deal

breaker for tenure and promotion. It tends to be a surrogate for “plays well with others” or “is a team player.” I would recommend again that you understand the importance of service for your target market, but keep in mind that the rules may change. Service may fall into four categories: department/school, university, community and professional service.

I would recommend highly visible service as opposed to grunt work. The best committees are the ones that have a specific purpose such as a task force. You want to show that you contributed to the committees that you serve on. Merely being a member and attending meetings is not enough. Be prepared to explain your contributions. Although departments and schools try to “protect” junior faculty from university service, you may want to consider serving on one visible university committee in order to get to know other people on campus. This is particularly true if you have to go through a university-wide rank and tenure committee. You may also have the chance to meet some administrators in this capacity. I would, however, recommend avoiding assignments on controversial committees.

Some schools are big on community service and others are not. Be sure to understand how being a scout leader compares to serving on a not-for-profit board. Some schools may only count community service if it is related to your discipline.

I would recommend that you serve as a reviewer for conferences and journals. Do a good job on these activities and the editors may also be people who can write recommendations for you. Also, reviewing papers will help you to become a better writer. I would not recommend serving as an officer of an organization until after tenure.

You and Your Relationships

Remember to not only find balance between teaching, research and service, but also find balance between your work life and your personal life. I have seen too many people ignore their spouse, children, parents and friends while they are seeking tenure and promotion. This may be OK in limited amounts of time before big deadlines, but don't live your entire life this way. If you are rested and have gotten away from work, you will be more productive at work.

I would also recommend that you read some of Parker Palmer's work on “role” versus “soul.” His work gives a good perspective on keeping balance in your life and not forgetting about nurturing your soul.

Conclusion

In conclusion, know what “counts” and what does not “count” at your institution. Avoid work that does not “count” toward tenure and promotion until after you achieve tenure and promotion. Find a mentor or two. Go beyond the minimums. Avoid procrastination, too. The tenure clock has a way of going all too quickly. I would recommend Brian Tracy's book *Eat That Frog* if procrastination is a problem for you. You want to have met all of your goals long before your institution-imposed deadlines. Then, you will have an aura of confidence rather than panic. Packaging is always important in marketing.

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Julie F. Toner
Rubel School of Business
Bellarmine University
2001 Newburg Road
Louisville, KY 40205
Phone: 502.452.8494
FAX: 502.452.8013
E-Mail: jtoner@bellarmine.edu

THE IMPACT OF THIRD-GENERATION MOBILE TELEPHONY (UMTS TECHNOLOGY) ON THE MARKETING APPROACH OF VIRTUAL NOMADIC COMMUNITIES

Jacques Digout, Toulouse High Business School, France

Natacha Pons, Marketing Manager at Microsoft EMEA, France

SUMMARY

The two greatest success stories in telecommunications over the last decade have been the generalization of Internet use and the emergence of the mobile device. It can even be said that, considering the categories of new products on the market, the combination of these two successes promises to open the door to the next common means of information access.

Third Generation Mobile Communication (3G), according to the UMTS standard, plays a significant role in the infrastructure providing seamless information access. Some even believe it will powerfully influence the way mobile access will be provided in the near future.

Indeed, this new technology, which increasingly supports the individual in its nomadic activities, offers functionalities that are closely linked to new consumption habits: notions such as immediacy, permanency of connection and personalization, which not only hereby achieve their full potential but can, if successfully emphasized by announcers, increase marketing capability within the mobile telephony market.

Particularly sensitive to these tendencies, and greatly affected by the concept of nomadism, virtual communities are an excellent target for the new mobile technology. Virtual communities therefore appeared to us to provide the ideal context for studying the new behaviors of the public faced with 3G technology, while at the same time pondering new marketing strategies to successfully reach this public.

This paper is organized as follows: we will begin by discussing the current status of the mobile telephone market in terms of technology and marketing strategies, while exposing the existing relationship between new technology and the phenomenon of communities. Secondly, we will reflect on Third Generation technology, including a presentation of its functionalities, an investigation of the promotional offers accompanying its launch and an inventory of its numerous limits, both for the announcer and the consumer. Finally, we will suggest various marketing approaches for conveying the new mobile technology to virtual communities.

Our study is based on the review of numerous documents produced around the time of the launch of 3G technology (hi-tech articles, market analyses, promotional brochures); as well as on interviews with several key players in the domain and customer testimonials. The aim of this process was to be able to think in place of an operator involved in the market and to propose realistic marketing tactics.

While we did not limit our research to French works, our reflection is almost entirely dedicated to the French market, which was the most easily approachable option for us in terms of ciphers, “live interviews,” and obvious cultural proximity. Furthermore, the French market appeared to us as the most appropriate environment for research in terms of timing: for example, whereas Japan is far more advanced than any other country in new mobile devices *inter alia*, and has already fully integrated 3G technology, the launch of this same technology in France has only just taken place, and marketing strategies are still in “experimental” mode. This allows us the full opportunity for free reflection on what can be done to successfully approach communities and market 3G technology.

Natacha Pons
Premier ISVs Marketing Specialist
Microsoft EMEA
Microsoft EMEA HQ - Coeur Défense Tour B
100 Esplanade du General de Gaulle
92932 La Défense
France
Phone: +33.1.70.99.16.72
Mobile: +33.6.80.5000.17
FAX: +33 1 70 99 10 30
E-Mail: t-npons@microsoft.com

LAPTOPS AND WIRELESS FIDELITY (WIFI) TECHNOLOGY SHOULD BE UTILIZED IN THE CLASSROOM

Alan R. Tillquist, Mountain State University

There's certainly one thing absolutely for sure – just putting in a computer and wiring the Internet into a classroom doesn't guarantee improvement.

Tom Glennan
RAND Senior Adviser for Education Policy

Clearly, technology is transforming the approach in which businesses utilize information, the manner in which educators teach students, and the modalities in which students learn (McCorkle et al. 2001). For these reason, education in the 21st century must provide students with experiences and tools that play major roles in both their professional and personal lives (Brown et al. 1998; Rubel 1996).

Given the rise of the Internet and a society based upon information, effective integration of technology into higher education has become a vital part of preparing graduates for careers in the business world. On a much more frequent basis, computer and/or technology-related competencies are cited as important support skills required of business students (Sterngold and Hurlbert 1998). Consequently, students are increasingly cognizant of possessing a thorough understanding within their specific discipline in terms of content and skills, as well as an ability to apply technology. Success in an entry-level position and career success in an increasingly competitive job market very much depends upon discipline and technology mastery.

During the past decade, lecture-based teaching methodologies have been more commonly questioned due to their passive knowledge-delivery process. An educator's role has continually evolved into a more sophisticated, dynamic, environment in helping students gather, evaluate, and synthesize information to be applied within their respective disciplines (Billings 2005). WiFi environments ultimately transcend the traditional paradigm of one professor to many students delivery format, in favor of an environment whereby numerous one-with-many electronic conversations are held concurrently (Bhave 2002). Traditional college-age students have grown up in a world that is interactive, communication intensive, and knowledge based resulting in the need to provide more visually stimulating material and technology-based tools in the classroom in order to maintain their interest, concentration, and motivation levels (Day 1996; Smart et al. 1999).

Wireless Fidelity (WiFi) is one such piece of prevalent technology found throughout our society and can be validated by its utilization in our homes, at work, and most recently in higher education. Institutions of higher learning are well served to focus on technology having a positive impact on student learning outcomes. However, technology is only valuable if integrated into curriculum in a meaningful and proper manner.

Evidence suggests that utilization of WiFi in the classroom is beneficial to the learning process. A study conducted by the Center for Applied Special Technology (1996) found students with online access demonstrate significantly higher achievement on measures of communication, information management, and presentation than did a control group which was provided with both computers and software but lacked internet connectivity. Another study conducted by Mark Young (2001) suggests that technology, when utilized in conjunction with proper learning strategies, technology savvy faculty and students, and an excellent system support, can positively affect learning.

WiFi connectivity provides many positive aspects as students have an opportunity to interact with their professor, classroom peers, and individuals outside the classroom. However, WiFi also presents distractions and control challenges for professors, as well as issues from a University's standpoint, such as new policies governing how networks will be used and security concerns surrounding transferring confidential data through the airways (Bhave 2002; Griffioen et al. 1998; Sutherland 2002).

Student-to-student dialogue within a classroom has significant potential, however determining a proper amount of this interaction and regulation is difficult. Clearly, classroom distractions are not new to education, given students daydreaming, passing notes, and whispering

scenarios that have gone on for virtually as long as there have been schools.

Classroom management practices are the prerogative of the professor, with potential protocols for gaining control and discipline actually much easier than one might believe. Systems currently exist that provide such control to an actual classroom. An example of one such system has been under evaluation at Temple University. The system takes the locations of students into account when determining WiFi accessibility and can be used to set rules that vary from location to location on campus (Schwartz 2003). Vanderbilt University's Law School has implemented a system that makes WiFi available to students in the classroom, however, restricts student access to streaming video and instant messaging. The University installed Bluesocket and with this system has been able to pinpoint with extreme precision WiFi access. Jason Bradley, Senior Systems Administration at Vanderbilt Law states that students outside the classroom in a study area have full WiFi access, however students in the classroom have limited access (Graychase 2005).

An increasingly important component of a business education revolves around the utilization of technology to its fullest possible extent. In order to better prepare business graduates for an increasingly competitive job market, dynamic technology that is prevalent in the private sector must be incorporated into the curriculum. For that reason, students in the classroom should be allowed to utilize laptops and WiFi technology. This technology will better equip graduates for organizational life in the modern business world.

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Alan R. Tillquist
Mountain State University
Box 9003
Beckley, WV 25802–9003
E-Mail: atillquist@mountainstate.edu

SHOULD LAPTOPS AND WiFi FOR STUDENT USE BE BANNED IN THE CLASSROOM?

T. Rick Whiteley, Calabash Educational Software

In 1751, Malachy Postlethwayt, in his book entitled, “The Universal Dictionary of Trade and Commerce,” proposed the establishment of The British Mercantile College so that gentlemen could receive a formal business education instead of learning solely on the job (Norwood 1961). In 1881, the first university-level business program was established at the Wharton School of the University of Pennsylvania (Hagerty 1936). The first university-level course in the U.S. with marketing-related content was first offered in 1902; the debate, however, was whether the University of Michigan (Maynard 1941), the University of Illinois, or the University of California was first to offer such a course (see Simon 1950).

The usual setting for marketing education during the past century has been the traditional classroom, with an instructor interacting with students within the confines of four walls. The primary tools used to convey instruction have been the blackboard and chalk and the primary implements used to record the instruction have been pen and paper. These items still exist today; however, things have changed over time.

Classroom issues faced by instructors from the early days of marketing instruction up to the present day have focused on two primary areas: the availability of relevant textbooks and the use of technology. The problem of finding appropriate textbooks, particularly for the advanced courses (Leigh 1937), has been an issue from the very beginning of formalized marketing instruction [e.g., in general prior to 1927 (see Kryk 1939), for consumption economics (Marshall 1940), for marketing research (Ferber 1951), for international marketing (Gordon 1964), for advertising (Ross 1973), for business-to-business (Kastiel 1986), and for e-commerce (James 2000)].

Concerns pertaining to the use of technology in the classroom date back to the 1930s. The point of interest was whether the new area of visual education should be promoted in the teaching of marketing (Cassady, Crawley, Graves, Lucas, and Stanley 1938). The technological choices were a moving picture projector [with sound (“talking pictures”) and without sound], a glass slide projector, an opaque projector, and film strips (Cassady et al. 1938).

In 1937, there was interest in using the balopticon for opaque projection of charts and maps (Leigh 1937). By the mid-1950s, films with sound and slide projection were common place (Shiffler 1954). In the 1960s, TV and the overhead projector were standard issue of the day, and the desk calculator (adding machine) and the slide rule served their roles (McRaith and Goeldner 1962). In the 1970s, the VCR entered the classroom, as did the electronic, hand calculator. The 1980s saw the development of the desktop PC and the laptop computer. Then, in the 1990s, along came the Internet and the cell phone for the mass market and the evolving “smart classroom,” with all of its multimedia capability, for higher education. After the turn of the century, more and more students started bringing laptops to class and the “smart classroom” got even smarter – WiFi arrived! The personal, wireless keypad used to respond to in-class questions also appeared.

In the past, classroom technology was generally under the control of the course instructor; however, with WiFi and personal laptop computers, students assume control. Similar to the question in the 1930s as to whether visual education should be promoted in the teaching of marketing, the question at the beginning of the 21st century is whether students should have classroom access to laptop computers and WiFi technology in the learning of marketing.

There are advantages and disadvantages of allowing student access to laptops and WiFi in the classroom. The advantages include providing students with access to online and internally stored course material, minimizing the extent of note taking, allowing students to enter notes in digital form, and allowing students to provide immediate feedback to the instructor (e.g., via in-class online quiz, email, etc.).

The disadvantages of allowing the use of such technology relate primarily to the instructor’s loss of control in the classroom: students will focus more on entering notes and on the computer than on the instructor (i.e., eye contact) or their classmates; they will have the opportunity to send chat messages to selected classmates; they will be able to play games or access any other material desired directly from their computers or online; and, as a group, they will

make a lot of noise entering information via the keyboard, thereby making it difficult for the instructor to converse with the class.

Allitt (2005) also voices some of these same concerns. In particular, he prefers a return to a non-tech classroom in order to “humanize” the classroom because of the “warm atmosphere of collective endeavor [that] would have displaced the anonymity and chill that the machines created” (p. B38).

The current trend in the public school system and future predictions indicate that laptop and WiFi market penetration will increase (Monalbano 2005). Students will expect the same availability and access in institutions of higher learning. Since both technological innovations possess advantages and disadvantages relative to what existed prior to their advent, both can be considered sustaining and destructive technology (see Christensen 1997). In order to minimize the destructive impact on the classroom environment, ways must be found to prevent and/or block access when desired (see Engebretson 2005), whether through classroom policies or technical means. There is also the need to address the sociological impact of the new technology on the educational process (see O’Shea 2002), including any divergent attitudes toward the appropriateness of such technology (see Drew 2002). In the end, the answer to the question as to whether students should have access to laptop computers and WiFi in the classroom must be answered in the affirmative. It’s the 1930s all over again!

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T. Rick Whiteley
Calabash Educational Software
RPO Box 43221 – Sheppard Centre
Toronto, ON, M2N 5X7, Canada
E-Mail: drtrw@calabash.ca

TIPS AND TRICKS FOR TEACHING DIFFICULT CLASSES: LARGE LECTURES, INTERACTIVE TV AND ONLINE COURSES

Robert C. Erffmeyer, University of Wisconsin – Eau Claire
William J. Hannaford, University of Wisconsin – Eau Claire

Large lecture classes are obviously challenging venues in which to teach. Generally, it is the basic marketing principles course that serves all business majors that is taught in this manner, with the more advanced courses serving only marketing majors often being much smaller. So there are numerous challenges:

- ◆ Not all students in the large principles course are necessarily very interested in marketing. In fact, many naively wonder why they need to be exposed at all.
- ◆ Lectures halls may be uncomfortable or poorly designed. Seating may be awkward/uncomfortable; acoustics may be challenging, and A/V equipment possibly not up to the task (unusable sound systems, dim projection bulbs, malfunctioning computers).
- ◆ The anonymity of room size and large numbers presents problems for maintaining classroom control and security.

Despite the challenges, over the years we have found that there can be good results and success in teaching the large lecture class. Student involvement is critical. To keep student interest high and to avoid the monotony of straight lecture, any number of involvement ideas has worked well.

- ◆ In-class exercises are excellent, done either individually or in teams. Assigning exercises creates a “lab-type” atmosphere of relaxed camaraderie that students enjoy, especially if allowed to work in teams.
- ◆ Allow teams (or individual students) to present their results. This gives them large audience presentation skills while maintaining audience interest, all the while relieving the pressure on the instructor.
- ◆ Try using pop quizzes to force good study habits. Students today will avoid reading the text whenever possible, so forcing them to read and study by holding out the possibility of a pop quiz really helps. After the quiz, do go over the results immediately, and try calling on different individual students to answer each question.
- ◆ Assign short cases or ethical dilemmas. Then call on individual students to explain and justify their answers.

- ◆ Consider a marketing simulation, with teams of students competing for prizes. This forces them to get to know others in this anonymous setting, and the experience can be fun and stimulating as a learning tool.

Perhaps more than in small classes, in the large lecture section, variety is the spice of life. We add variety to our classes in the following ways:

- ◆ Field trips. We always take at least one field trip per semester. Because we are fortunate enough to have a Wal-Mart Distribution Center nearby, we typically caravan students to the DC over a 2-day period each semester. Wal-Mart is most generous in providing tours, and the students enjoy seeing physical distribution, wholesaling, and logistics activities firsthand.
- ◆ Guest speakers. Always welcome as a change of pace, guest speakers can truly add a dimension of interest to the large lecture class. But choose them wisely: if they are not truly dynamic, with a compelling and interesting marketing message, the experience can backfire. Perhaps the most important tip is to ask the guest not to lecture the student on marketing principles. That’s your job as the instructor. The guest’s job is to tell their company story in a compelling way, using vignettes or recounting interesting strategic decisions. Often our guests bring product samples or product-related merchandise like T-shirts as giveaways in exchange for student willingness to participate. A good idea!

Interactive TV can vary widely by the technology your school uses. There are several variables one needs to consider when teaching in this format. We think the key variable is the number of sites to send and receive from. Unless you have access to a great deal of technical assistance try to limit your receiving sites to one or two the first time you teach.

- ◆ Have a live class in front of you. Nothing is worse than talking to a camera. If at all possible have a group of students in your send site. You can use them to gauge who well you are making your points and areas needing clarification.
- ◆ Teaching to more than two distant sites can become

a real coordination challenge. Make use of emails and attachments. Having the help on an on-site assistant to coordinate paper/exam distributions will save valuable class time.

- ◆ Have plenty of back ups. Make sure you have access to a phone and a phone number to call (even a student cell phone) to communicate with students at your distant site - just in case you lose your audio as well as your local media technician. Consider having each class taped – just in case you can't connect with a distant site. This way you can at least send them a copy of the class.
- ◆ Use presentation media (e.g., Power Points) to help communicate your teaching points. We offer this suggestion with reservations not to over do it. Students at the distant site may be dealing with a variety of distractions (including bad audio) that they may hesitate to let you know of. Sending them the framework of your notes before your lecture will facilitate their note taking.
- ◆ Engage your distant sites immediately and often. If you don't do this you really will be a "talking head." Remember, they call it interactive for a reason.
- ◆ Don't hesitate to use group work.
- ◆ Teach from a distance site. While not always possible traveling to the distance site(s) to teach a course is a real morale booster to the students at that site and helps the local students better understand what their colleagues are experiencing.

Online Courses also vary depending upon your school's technology platform and assistance available to you. A few hours in an orientation course should be considered time well invested.

- ◆ Developing a new course is time consuming. No way around it. You should receive development funding and technical help if you do this. Teaching a course that is already developed is a good way to be intro-

duced to online education.

- ◆ Online courses take more effort than on-campus courses. If you want to do a good job, most agree that they will take more time than a comparable on-campus class.
- ◆ Don't allow the class to become too large. A class of 25 to 35 is realistic from both the instructor's and administrator's points of view.
- ◆ Set realistic student expectations early (e.g., I will try to respond to your questions within 24 hours. I will not be checking the class over the weekend. I will return your materials within 7–10 days, etc.). Let them know you don't plan to operate the same hours as your local Walgreen's pharmacy.
- ◆ Keep emails within your class platform. Receiving emails from students outside of the class environment (i.e., at your school address) increases the changes you might miss one or fail to incorporate it back into the class later.
- ◆ Personalize messages as much as possible. This includes emails and public kudos.
- ◆ Acknowledge student efforts publicly and privately. This lets them know you are reading their material and they're not dealing with some black hole or grading machine.
- ◆ Be realistic about exams. Sadly, even the best honor code may be in jeopardy by a challenged student. Take efforts to minimize cheating. Don't make exams so point heavy that students are tempted to cheat. Include papers and exercises that requires their unique perspective (e.g., in their introductions have them comment on a job they have had – then at a later point have them use this as a part of your exercise).
- ◆ Plan a time every day to work on the class. Don't think you can "catch up" on a slow afternoon.
- ◆ Develop a research stream around some online teaching activity. This helps you rationalize all the work you are putting in the course.

Robert C. Erffmeyer
University of Wisconsin – Eau Claire
Eau Claire, WI
Phone: 715.836.4644
E-Mail: erffmerc@uwec.edu

TEACHING DIFFICULT CLASSES: KEEPING HIGH TOUCH IN HIGH TECH

Rob K. Larson, Luther College

The landscape of higher education is being dramatically changed by technological, social, and competitive factors. Two of the outcomes of these influences are an increase in the number and type of non-traditional delivered courses along with faculty being expected to teach courses with structures they may not be experienced in teaching.

The influences that are bringing about new delivery models are powerful. These include:

1. Economics of enrollment management.
2. Leveraging current campus infrastructure.
3. The increased availability of and comfort with technology by society in general
4. Competition from traditional and new non-traditional institutions.
5. The capacity of new technologies to improve teaching and learning.

Many question the efficacy of distance delivered courses. Serious issues exist involving assessment, course content, and other aspects of these education models. What will remain constant is the pressure from the influences driving these delivery systems will continue to grow with the result being continued pressure to find ways to meet economic and social demands for the delivery of courses.

This paper summarizes some of the considerations involved with distance delivered courses and provides a list of strategies to enhance the effectiveness of these courses.

CHALLENGES IN DISTANCE DELIVERED COURSES

Challenges exist with every type of delivery model. With distance delivered structures the teaching implications of not having a scheduled meeting time and place where each student assembles are immense and obvious. Immediate feedback and interaction, in-person assessment opportunities, discussions, and other elements of the traditional classroom setting are lost in their current form. Two other challenges in distance delivered courses are important and need to be considered. The first is the limitation of the technology systems involved in the deliver of the course. Access to technology including bandwidth of the access, robustness of course management software, and related elements will impact teaching alternatives that can be

used. Second is the training and support of the faculty member involved in these courses. These challenges need to be considered in the preparation, development, and deployment of distance delivered courses.

ACADEMIC OBJECTIVES

While some of the reasons for new delivery models are competition and economics driven, new technologies have tremendous potential to not only improve access to higher education but to also create learning environments that can be very effective. Maintaining a focus on the potential benefits of a distance delivered classroom can be a challenge with an instructor is facing teaching in a less familiar environment. This issue can be exacerbated when many within the academy consider these deliver systems inferior and an outgrowth of non-education influences. It is a valuable exercise to identify general non-discipline or course academic objectives that can be accomplished in a non-traditional system. These might include:

1. Enhance access to professors and classmates. Technology supports asynchronous meetings among students and between students and faculty affording access despite differing schedules.
2. Encourage and increase the free exchange of ideas between students and between students and faculty. The absence of traditional face-to-face discussions may be an opportunity the alternatives are not constrained by the limits of being held (almost) exclusively in a single site for specific periods of time.
3. Overcome distance barriers to exchanges. Reality is that students do not all live in common settings nor they have common schedules. If a learning objective is to create interaction between diverse groups of students, technology can minimize the need to limit out of class cooperative learning due to logistical issues.

DELIVERY AND CLASSROOM STRATEGIES

This section very briefly identifies strategies that may be used to enhance the effectiveness of teaching distance delivered courses.

1. Cooperative Learning. Use common cooperative learning assignments that are completed and reported on by students who may not ever even meet.
2. Timely feedback. In a setting where instructor con-

tact is limited the timeliness and quality of feedback is critical.

3. Pedagogical presentation. Recognizing different learning styles and accommodating them with visual, auditory, and other types of content presentation.
4. Collaborative work. Examples include group assignments and critiquing of electronically posted writing or other student work.
5. Use of complementary technology. Discussion strings and other technologies can enhance a class by replicating the free exchange that would typify a traditional classroom discussion.
6. Meet with students. Where possible, having a time (particularly early in the term) where students may meet each other and the instructor can build a personal foundation for the course.
7. Classroom Assessment. Creating simple assessment tools to gauge how students are progressing can provide useful information as well as personalize the course.
8. Clear syllabus. Having clear and specific expectations for course work, contact with instructor, assessment, etc. is critical in a course where traditional access is limited.

CONCLUSION

The influences that are contributing to the growth of distance delivered course formats are certain to increase. The outcome will be more courses being taught with some or all of the delivery being done through various non-traditional technologies. Some faculty will teach these course by choice others due to administrative decisions.

How different institutions or individual faculty members adopt new delivery systems it is important to recognize that high touch and high tech in learning environments are not necessarily competing alternatives. Creatively deployed these systems can be powerful tools that deliver both high touch and high tech.

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Rob K. Larson
Luther College
700 College Drive
Decorah, IA 52101-1045
Phone: 563.387.1568
E-Mail: larsro01@luther.edu

TECHNIQUES FOR SUCCESSFUL INTERNET CLASSES

Sharon Wagner, Missouri Western State University

Teaching a class entirely – or even partly – on the Internet is an exciting, challenging, and occasionally frustrating experience. This experience also calls on the professor to make many decisions about how to best translate the face-to-face experience into an online situation: how to make the course interesting and valuable to the students.

It is vital that the professor starts to plan early. Work closely with the WebCT/Blackboard expert on your campus. It may even be possible to obtain one class worth of released time in order to do the proper preparation.

Contact your students a couple of weeks before the class starts. They may need instructions on how to log on, how to contact you or a help desk, and they may need time to get the software, internet connections, etc. that they will need. Attach your syllabus and schedule, even though that information will be on your Web site. You may want to add a short section on “Netiquette.” Set clear standards for participation, give precise instructions on your expectations, and then stick to them.

Be present in your course. You may want to announce online “office hours” where you are logged into your mail system, and are available for questions or problems. Read the discussions as they go along, and join in occasionally so that they know you are paying attention. Point out particularly innovative answers or add to the discussion. You can send an e-mail at the end of the discussion wrapping up the discussion, highlighting the main points, complimenting on the thoroughness of the discussion, etc. This is a balancing act – be present, be aware, but don’t dominate. These discussions are more like the small group discussions that are held in class. Let them lead. If students are not following netiquette principles, contact them individually and off of the discussion board. If students are not participating, contact them quickly.

Provide them with the tools for success. Many publishers provide practice quizzes for the students. If you create study guides for your face-to-face classes, they can be converted to html and posted on your course web page. You can make a notes version of your PowerPoint presentation available to them.

You can have a discussion inside your Web class. Remember Bloom’s taxonomy and ask the “how” and “why” questions. Ask them to debate an issue or ask a “naivete” question that will get them involved. Designate a time by which they must answer a question. Most instructors then ask students to reply to two different answers, and give specific times when this must be done. Give grades for the discussion. This activity can be valuable to achieve a sense of community within the class. Since we would like to achieve “a community of scholars” this provides students with the synergy of a small group discussion, where students really can learn from each other. This way, everyone participates, not just the gregarious few. The instructor can then compile and print the discussion for your records. Due dates must be strictly enforced.

Try to make life organized for you as well. Create a form e-mail that will let your students know when you have received an assignment – especially if you will be later getting things graded than they were expecting. Save all copies of discussions, assignments, etc. with your students. If you assign homework, give them specific instructions for the “subject” line, such as “MKT 301 Eames Case 1.2” You can then set your e-mail to sort those messages with “MKT 301” into a separate folder which you can then go in an grade. You can also set up a form e-mail message that the assignment was received.

Learn to grade online. Have the students save their assignment in Word (or use rich text format), save the document to your computer, then go to Tools, Track Changes, and you can type in your comments as you go along. Print that document, save it, and send it back to your student.

Student retention can be an issue. Older students may not be as comfortable with the technology and may need more assistance in getting started. Some students may sign up for the course with the idea that it is going to be like a correspondence course, and may not be prepared for the rigor that you expect.

Meticulously follow copyright permissions and restrictions. Be sure the material at a website is “free” before you transfer images into your course. If not, ask. It might be easier to just create a hypertext link.

You need to be redundant! Even if directions for discussions are in your syllabus, e-mail the whole class before the semester starts, post directions somewhere else as well. They may be so overwhelmed with the site, maneuvering, they might not read the syllabus, etc.

Remember the potential problems of bandwidth and file downloading that may plague the student. No matter how terrific your lecture is with links and videos – if they can't see it, they become frustrated.

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Sharon Wagner
Department of Business
Missouri Western State University
Saint Joseph, MO 64507
Phone: 816.271.5824
E-Mail: wagner@missouriwestern.edu

USE OF TEXT EXERCISES, CASE STUDIES, AND COMPUTER SIMULATIONS TO ASSESS THE LEARNING OF STUDENTS WITHIN MARKETING PROGRAMS: WALKING THE TALK

Alfred G. Hawkins, Rockhurst University

James E. Puetz, Rockhurst University

Joel C. Watson, Rockhurst University

The three primary techniques of lecture-discussion-exercise, case-analysis (published or live) and business-based computer simulation are each actively incorporated into the teaching plans for the business programs at many institutions including the Helzberg School of Management. Each technique has been in use in each program at for the last several years. Like many schools, each course is a blend of these techniques balanced to meet the objectives of that course as it fits within its specific business program.

As part of its continuing improvement process, the Helzberg School performs ongoing assessment of student learning at both the course and program levels and then works to improve that level of learning to further the schools mission. For example, the marketing faculty is using a specific simulation to assess the learning of each

student in each marketing program, especially as the program's learning goals relate to the integration of analysis and decision-making, teamwork, and market performance. The marketing assessment efforts also make use of published and live case efforts to evaluate student learning as each moves through a program. When a problem appears, the faculty works to overcome it.

The marketing faculty would like to discuss with colleagues from other schools:

- ◆ How they assess student learning for course and program improvement
- ◆ What has worked well in their programs and what has not
- ◆ What might yet be done
- ◆ How they approach developing and implementing change

Alfred G. Hawkins
Helzberg School of Management
Rockhurst University
1100 Rockhurst Rd.
Kansas City, MO 64110-2561
Phone: 816.501.4564
E-Mail: alfred.hawkins@rockhurst.edu

James E. Puetz
Helzberg School of Management
Rockhurst University
1100 Rockhurst Rd.
Kansas City, MO 64110-2561
Phone: 816.501.4044
E-Mail: james.puetz@rockhurst.edu

Joel C. Watson
Helzberg School of Management
Rockhurst University
1100 Rockhurst Rd.
Kansas City, MO 64110-2561
Phone: 816.501.3141
E-Mail: joel.watson@rockhurst.edu

SIMPLIFYING PROCESSES FOR INTERNATIONAL STUDENTS

Peter J. Gordon, Southeast Missouri State University

Willie J. Redmond, Jr., Southeast Missouri State University

Tori Patterson, Southeast Missouri State University

ABSTRACT

Over the past several years, procedures for international students who wish to study in the United States have changed considerably in response to heightened fears of terrorism. These changes have added additional costs and layers of bureaucracy that the incoming student will face. Each of these complications act as barriers to the student, as the more difficult and costly the process becomes, the more likely it is that the student will elect not to study in the U.S. This paper looks at how the admitting university may be able to reduce some of the barriers that confront the international student.

Introduction

Over the past few years, the Department of Homeland Security has instituted new procedures (one being the SEVIS data base) to process student applications. Congress mandated that the cost of this system can be recovered by charging the users – in this case, the applying student. All students are now required to personally appear at a U.S. consular office; while previously this was a step that many students could previously complete by mail. Depending on the country, a trip to the nearest consular office can be a time consuming and expensive process, often involving travel and hotel expenses.

The rationale for encouraging international students to come the U.S. is unchanged. It allows the student the opportunity to experience U.S. culture, a capitalist economic system, a democratic political system, gain experience which may help both the student's career development, and to develop relationships with persons of different cultures. Long term benefits may accrue to the "sending" country, because if the student returns, they have citizens who can contribute to the development of their country after being exposed to "cutting edge" education and technology in the U.S. Alternately if students stay in the U.S. the "receiving" county can gain, as the U.S. has thus gained productive immigrants. In a global sense, international cultural exposure may contribute to better

political understanding and in the long term, greater peace and harmony between nations.

Foreign students who seek the individual benefits of international study have several alternatives to the U.S. In particular, Canada and Australia each present viable alternatives to the U.S. They have high levels of technology, high standards of living, democratic political systems, capitalist economies, and both have English as the primary language. As barriers to entering the U.S. have risen, applications to competing countries also have tended to rise.

Additionally, as educational standards and opportunities increase in traditional "sending" nations, many students simply find it easier to stay at home and study, rather than face first, the daunting bureaucracy of getting a visa, and then the resulting perception of an possibly uncomfortable welcome once they arrive in the U.S. Many overseas universities are now conducting some or all of their MBA program components in English, yet another reason for students to stay at home.

International student enrollment at U.S. colleges and universities dropped 2.4 percent in 2003–2004, the first decline in more than 20 years. Of the 25 largest foreign student enrolment universities in the U.S., 15 have reported international enrolment declines, some as large as 20 percent. (NAFSA 2005)

Another undesirable side effect of the increased cost of foreign students obtaining U.S. student visas is the retaliatory actions of some foreign governments, thus increasing barriers to U.S. students who want to study overseas. This particularly hurts reciprocal *exchange programs* where parity must exist between *students-out* and *students-in*.

In addition, universities can look to foreign students to boost enrolment at a time when, demographically, enrollments are expected to fall. Not only does the marginal revenue from paid tuition increase funds, it also helps

contribute to fixed cost operations such as dormitories, etc.

University Response

Lobbying efforts, both directly and through various organizations, may be helpful in bringing pressure on the Department of Homeland Security to streamline the processes that are imposed on international students applying for a visa. Already some progress is being made:

“I have a special message for young people across the world” said Karen Hughes, the new U.S. under-secretary for public diplomacy and public affairs, at her Senate confirmation hearing July 22. “We’re improving our visa process, and we want you to come and study in America” (Star Tribune, August 6, 2005).

However, closer to home, the university may be able to streamline its own processes to reduce application. Some universities have started providing financial incentives to foreign students. These range from refunding some visa fees after they have enrolled or successfully completed a period of study, to offering tuition discounts. Some universities allow (some) foreign students to enroll and pay in-state rates. However, these options require earmarking of funds to help with international enrollments, and on many campuses, faced with tight budgets, such initiatives can be a hard sell.

Action may also be taken at the level of the Business School. One way of reducing costs for the incoming international graduate business student is to change admission requirements. Currently, most MBA programs require incoming international students who come from a non-English speaking country to take the TOEFL – Test of English as a Foreign Language – test and the GMAT – Graduate Management Admission Test. Are both tests really necessary? Could the GMAT alone be used?

What is the GMAT?

The Educational Testing Service (ETS), the world’s largest private educational testing organization, administers the TOEFL and GMAT tests. Since they have a vested interest in universities requiring both tests, they have not released any data to support (or not support) the idea of using the GMAT as a substitute for TOEFL.

The GMAT exam is administered in English and consists of three sections, measuring “basic verbal, mathematical, and analytical writing skills.”

- ◆ The *Verbal Section* – consists of 41 multiple choice questions of three types – Reading Comprehension,

Critical Reasoning and Sentence Correction.

- ◆ The *Quantitative Section* – consists of 37 multiple choice questions
- ◆ The *Analytical Writing Assessment* – includes analysis of an issue and analysis of an argument.

From the above descriptions, it is clear that the GMAT exam does measure the student’s ability to communicate in English. The ETS website goes on to explicitly state what the GMAT does not measure:

- ◆ your knowledge of business
- ◆ your job skills
- ◆ specific content in your undergraduate or first university course work
- ◆ your abilities in any other specific subject area
- ◆ subjective qualities – such as motivation, creativity, and interpersonal skills.

Therefore the ETS’s own caveat on what the test does not measure includes *learned subject-specific* knowledge, but it does not suggest that it is unsuitable for measuring English skills. In fact as we noted, they implicitly state that it is indeed effective in that area.

What would this mean for a student? Currently ETS charges \$250 for a student to take the GMAT, and \$140 for TOEFL. Elimination of the dual requirement would save the student over 35 percent of the test fees, plus reduce the cost of commuting to take the tests by 50 percent, as they would now have to take only one test.

It should be remembered that most students coming to the U.S. for graduate studies are coming from countries with much lower levels of disposable income. A savings of \$140 would be considered significant to these students. Furthermore, a university allowing students to avoid taking the TOEFL may be perceived to have a differential recruiting advantage and be able to attract a greater number of international students.

Currently ETS is revamping its TOEFL test to incorporate speaking components. This would differentiate the test from the current GMAT. However, at this time, neither test includes speaking components.

A Pilot Study

Using a data base of MBA applicants at our University, we compared GMAT and TOEFL scores for all MBA applicants that had completed both tests. The list consisted of 31 students. A simple correlation analysis yielded a Pearson correlation coefficient of 0.612 (*p-value* = 0.000 . . . indicating strong significance at the $p < 0.01$ level). Therefore, our preliminary results indicate that there is a strong correlation between the GMAT and TOEFL scores.

Qualitative analysis indicated, however that while no applicant had “failed” the TOEFL test (threshold electronic score of 213 = paper test score of 550), two students had failed to attain at threshold score of at least 400 on the GMAT. This would indicate that no student would have been admitted based solely on the GMAT that would not have been admitted based on both scores. In other words, according to these results, the GMAT was a more discriminating test than the TOEFL.

Summary

To paraphrase Neil Armstrong, business schools could “take a small step for foreign students” by considering elimination of the dual requirement of TOEFL and GMAT.

A small pilot study showed that no improperly prepared student (at least based on these tests) would be admitted by using the GMAT alone compared to using both test.

It is likely the same argument could be made for the GRE (Graduate Record Examination) for graduate students in other disciplines.

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Peter J. Gordon
Department of Management and Marketing
Southeast Missouri State University
Cape Girardeau, MO 63701
Phone: 573.651.2914
E-Mail: pgordon@semo.edu

Willie J. Redmond, Jr.
Department of Economics and Finance
Southeast Missouri State University
Cape Girardeau, MO 63701
Phone: 573.651.2327
E-Mail: wredmond@semo.edu

Tori Patterson
Department of Management and Marketing
Southeast Missouri State University
Cape Girardeau, MO 63701
Phone: 573.651.2317
E-Mail: toriepatterson@yahoo.com

TEACHING ONLINE: SUGGESTIONS FOR SUCCESS

Michelle B. Kunz, Morehead State University

Approximately ten years ago, teaching classes complete online was considered “bleeding edge” technology. In many instances the experience left professors “bleeding” from the battle experience. Today, teaching online classes has become almost routine for many of us. While it may not be the best way to deliver ALL content, it can be a successful learning experience for both the student and the instructor in most cases. As with any delivery method, the online environment requires some special considerations. In some instances this mode of delivery may require the instructor to think “outside of the box” for certain exercises, assignments, activities. However, in all my experience, I have never had to delete something, rather just revise my approach to an activity. So, based upon my experiences I provide the following list of recommendations and observations.

1. Plan, plan, plan. It is imperative that you plan your online course. “Flying by the seat of your pants” simply won’t “fly” in the online environment. I have several colleagues who arrive in their office only 5 or 10 minutes before their face2face class begins; open their PowerPoint or jot down some notes, and fly off to “teach” their 60 minute class. Needless to say, this type of planning doesn’t bode well for a successful online class. I typically begin my syllabus and course planning about mid-term of the semester prior to when the class will be taught. Then I tinker, revise, edit, re-revise, re-tinker, re-edit until the end of the current term. I almost without fail get requests for my syllabus for the online class, a week or so prior to pre-registration on campus for the up-coming term. Even with pre-planning at mid-term, I may not have the syllabus put together before I get requests.
2. Be flexible. No matter HOW much pre-planning you do, something is bound to put a wrinkle in your class. It may be the university server going down; loss of a major node on the Internet; computer crashes, etc. In what I consider legitimate circumstances, I’ll revise due dates, or content requirements. However, I do NOT make such allowances for lack of planning on the student’s part.
3. Have a backup plan. Have an alternative email address, such as Yahoo or Hotmail where students can submit assignments, and communicate with you. I recommend that my students also use an alternative email as well. In the past year, our university email

server has crashed twice, and for one full semester, we ran with very limited capabilities on a “temporary” server. Thus, I relied on an alternative email for my class most of the term. If your university’s instructional server or course management system (Blackboard or WebCT) isn’t reliable, consider using the textbook publisher’s support site. There are also several open-source services available, one of which is Moodle, available at <http://www.moodle.com>

4. Do not lower expectations. I am adamant that I do not lower the requirements, nor my expectations of what students should be required to complete in my online classes. I find the most difficult expectation is testing online. If our Blackboard server works properly, testing and assessment can be virtually the same as the traditional classroom. However, when the server doesn’t allow a reliable environment, it becomes my responsibility to find an alternative method to have that backup plan in place.
5. Include the kitchen sink. I try to write out ALL the project and activity descriptions and include them in my syllabus. I also include a list of expectations that I and the university Office of Distance Learning have for DL and online students. I also include my Teaching Philosophy, as well as my philosophy on Team Projects. My syllabus includes the due dates of all projects and assignments, as well as a detailed list of dates and topics to be covered. I establish a standard weekly due date with time stamp. I usually pick something basic to work environment: 8 AM, Noon, or Midnight. That’s easy to remember, and sets a standard for the term. I have also copied a tool from a colleague. He posts a Tip Sheet, and includes a section of Pet Peeves. This is a great way to set the standard for your class “conduct,” and provide students a very simple way to know what you want them to do, and how they should do it. I include some basic “netiquette” tips; due dates and penalties for late work; participation expectations, etc.
6. Be vigilant for plagiarism. The online environment seems to encourage “lifting” and “sharing” of files, assignments, documents, etc. Students seem to think it’s easier to slip through in the online classes. If your university subscribes to an anti-plagiarism service, such as Turnitin.com, avail yourself of it. While I have not found many true cases of full-lifting from

online sources, it has helped me in explaining to my students what reference citations are all about – and what is NOT fully cited. Please note that the majority of my students don't attempt to cheat, but I feel it is imperative that I set the standard such that they aren't tempted to think I don't care if they do!

7. I don't think that the online environment should be time and place bound. The virtual environment restricts participation to those who are online together synchronously. Up until last year, I did give the groups a virtual chat option. However, I had several instances that a group would explicitly exclude one teammate by meeting during that individual's work schedule. Then they had the audacity to complain about that person's unwillingness to participate in the team meetings. If any team feels this severely limits their ability to communicate, let me know; I can reconsider this option. I do however have several colleagues who do use virtual chat or classroom tools, or Instant Messenger for their online office hours. These are both excellent tools to provide further interaction with the students, and you'll get to know them on a more personal basis. However, my bad past experiences, and the fact that I still have several students using dial-up connections that make participation virtually impossible, I choose not to provide these tools. I do however, explain this to my students, so they know why I do things the way I do.
8. Set time aside for the online class. The first time or two you teach a class online, it will take you longer to grade assignments, get the formatting the way you like it, tweak the assignments, etc. However, you still need to take time to read the materials, post assignments and responses, and grade!! Therefore, set a time when you'll work on the class. I have found that if I get interrupted while I'm working on grading or posting, almost without fail, I'll miss someone's work, or make a mistake when I post grades. Therefore, dedicated time is essential. I also plan my semester schedule around my other classes, papers and due dates, travel and conference dates, etc. That way I have time to grade a batch of papers and return them promptly to the students. I haven't gotten the hang of grading papers online, in the digital format. When I do grade this way, I'm not terribly efficient,

but I'm getting better at it. However, if you do grade from the printed paper document, there's always the recycle bin at the end of the term.

9. Be a real person. While I feel it is important to set a professional tone for all classes, I do try to laugh at myself when I make a mistake in my face-2-face class, so why not do the same in the online environment. When I travel to a conference I share something with my students online when I return. I tell them something about myself, like the six cats I have, or that I grew up on a farm in Kansas, etc. In fact, that's the first assignment I give every online class. Tell us a little about yourself, where you're from, what you do, why you're taking this class, etc. I get to know how many time zones (or countries) I have students in, and little something about them and their personalities. I also get to know where they are in their educational program, so that gives me some background when I customize assignments and projects. Just as I do in my traditional classes, I have to make allowances for personal situations, such as a death in the family, serious illness, birth of a baby, etc. I think I have only had one student take advantage of me in four or five years, so it's worth the effort to make accommodations for special circumstances.
10. SAVE, SAVE, SAVE! I have a backup of everything that I post online. I download and save all my students' documents. I keep an Excel grade book, in addition to the one in Blackboard. I use a Yahoo email account, so I can file and save ALL correspondence from my students for the term. I also print out and keep my discussion board postings, etc. for the term, just to be sure that I don't miss something, and to keep the needed record for reference should a question arise. I also stress the importance of backup documents for the students' peace of mind as well.

There many to disregard online classes, lumping them into nothing more than an "electronic correspondence" course. However, I feel the technology is here to stay, and we professors will find this medium meets the needs of an ever-changing student population at an increasing rate. While it may not be the best platform for some classes, for the most part the shortcomings are far outweighed by the strengths and benefits.

Michelle B. Kunz
Morehead State University
150 University Blvd.
UPO 526
Morehead, KY 40351-1689
E-Mail: m.kunz@morehead-st.edu

TOP 10 TECHNIQUES YOU CAN USE WITH YOUR INTERNET CLASS BUT WERE AFRAID TO TRY

Sharon Wagner, Missouri Western State University
Christiana Houck, Missouri Western State University

Does your online course need some new life? Try some new techniques to add interest and stimulate learning.

#10: Introductions

The biggest distancing factor is not seeing the people in your class. This goes for students and instructors alike! To decrease the distance, have students create a homepage inside the LMS. The homepage would contain a photo or avatar of the student along with personal facts and tidbits. If your learning management system (LMS) does not have a homepages tool, this activity can be completed using the discussion board. Ice Breakers, long used in classrooms, can be adapted for the online world. For example, in “**I’ve Done Something You Haven’t Done**” students introduce themselves and state something they have done that they think no one else in the class has done. Classmates read posts and respond if they have done it. Post that gets no matches wins – consider offering an extra credit or immunity from posting one time.

#9: Discussion Boards

In an online course, discussion boards are the primary form of student-to-student interaction. Discussions require special attention. Students will not value discussion if the instructor does not. How does the instructor show his/her valuing? By requiring discussion posts, providing a rubric, giving grades for them, and responding to posts. You require the students to answer to question you posted, and two replies to other students’ posts. Our own students have told us they want more discussion and want to feel like what they post is read – they want to have an active to role in their learning. Finally, use the student’s name when you reply.

#8: Chats

Chats can be conducted using the LMS chat room, or in Yahoo! or AOL. They can be one-on-one to review a topic or in small groups to disburse information. The instructor does not have participate in chats – you can encourage

students to use chat as study buddies. While instructors and non-traditional students may enjoy chats more if less than 6 people are involved, the traditional student is often accustomed to being in chat rooms with dozens or hundreds of people. These students will not feel overwhelmed or get lost in a conversation. Your best bet is to start small and learn what your students can manage.

#7: Group Projects

While widely used in face-to-face classes, the distance factor scares many instructors off using groups online. However, most LMS have built-in functionality for managing groups including private communication tools, file sharing, and presentation areas. Students will experience a work relationship similar to the modern business world, where most, if not all, collaboration is electronic.

#6: Mini-Lectures

Students request course information beyond the textbook. Mini-lectures offer the instructor the opportunity to provide additional content – to include their own knowledge. They can be created as text files, narrated PowerPoints, or streaming video. File size, and therefore length of lecture, have to be taken into consideration as all students do not have the technology needed to watch a 60 minute lecture.

#5: Multimedia

Besides mini-lectures, the use of multimedia strengthens learning while appealing to the modern student and a variety of learning styles. Multimedia can come in the form of Jeopardy-style study aides built using StudyMate software, animations of marketing concepts, sample of marketing campaigns (with copyright permission, of course).

#4: Teacher Tips

Let’s not forget the small details! When taking a course online, it’s easy to only see the big pieces: creating the

content, building the assessments. But we have found it's the small things that create the most issues. To begin, be concise in your communication. With reading online, it's easy to misunderstand. We strongly suggest you use action sentences and bolding for emphasis. Your content needs to be laid out in a logical and attractive format to ease comprehension. HTML is the best format for presenting content. Documents and presentations sometimes fail to open in browsers. Most importantly, your role as instructor becomes that of "guide on the side." Learn to ask open-ended questions that probe for learning rather than lecture.

#3: Hyperlinks

As part of being "guide on the side," you will realize that there are numerous places students can obtain knowledge. As a guide, you need to select Web sites related to the teaching topic and hyperlink those site from your online course. Create assessments that require students to research the sites and compile the information. If your course platform allows it, you may want to create internal links from your power point to a question in the discus-

sion. Some instructors have reported good response by this link.

#2: Guest Speakers

Again, as "guide on the side," you see that interviewing business leaders to appear in streaming video as guest speakers is a great tool for exposing students to the real world. The video interviews are more convenient than having inviting the business leaders into the classroom at set times and days and can be reused over semesters. Remember, these video guest speakers can also "visit" your face-to-face class.

#1: Virtual Field Trips

Topics involving specific industries or cultures benefit from sensory involvement. Take images, sounds, and text to make a virtual field trip into that industry or culture. The virtual field trip could be streaming video tour of a manufacturing plant. Or, it may be photos of a foreign marketplace with descriptive text and music from the country.

Sharon Wagner
Department of Business
Missouri Western State University
4525 Downs Drive
Poppellwell Hall, Room 309-H
St Joseph, MO 64507
Phone: 816.271.5824
FAX: 816.271.4508
E-Mail: wagner@missouriwestern.edu

Christiana Houck
Instructional Media Center
Missouri Western State University
4525 Downs Drive
Hearnes Center, Room 146
St Joseph, MO 64507
Phone: 816.271.4172
FAX: 816.271.4295
E-Mail: chouck@missouriwestern.edu

ACADEMIC DISHONESTY: DEALING WITH AND PREVENTING PLAGIARISM AND CHEATING

John Bennett, University of Missouri, Columbia
Karen James, Louisiana State University, Shreveport
Rama Yelkur, University of Wisconsin, Eau Claire

According to the American Council of Higher Education, academic dishonesty is a growing problem that shows no signs of slowing (Nowell and Laufer 1997). One study found that as many as 80 percent of college students have cheated to a greater or lesser extent (Nonis and Swift 1998). Regrettably, this finding mimics that reported in a 1999 study encompassing 21 college campuses and a sample of 2,100 students (CAI 2005). As reported on the Center for Academic Integrity's (CAI) website, more than 75 percent of the study's student respondents admitted to some form of plagiarism or cheating (CAI 2005). Furthermore, data collected in longitudinal studies demonstrates a disturbing trend related to "significant increases in serious test/examination cheating and unpermitted student collaboration" (CAI 2005). The CAI website (2005) further documents the growing prevalence of plagiarism stemming from the cutting/pasting of digital information, particularly that available via the Internet. As recently as 1999, a mere 10 percent of student respondents admitted to cut and paste plagiarism; astonishingly, the percentage of students who admitted to this behavior increased substantially to 41 percent in the space of only two years. Perhaps most unsettling though, is the fact that over two-thirds (68%) of the students surveyed felt that cut and paste/Internet plagiarism was NOT a serious issue (CAI 2005).

The prevalence of plagiarism and cheating in U.S. institutions of higher learning is all the more serious as a variety of studies have found that those who cheat while in school are more likely to engage in dishonest behaviors in other facets of their lives. For example, a six campus study by Nonis and Swift (2001) found that college students who engaged in academic dishonesty were more likely to continue their nefarious ways by committing dishonest acts in the workplace. Earlier studies suggest strong links between cheating in school and dishonest behavior related to income taxes, athletic contests, politics (Fass 1990) medical school student performance (Baldwin and Daughterty 1996) and job task performance within the communications profession (Todd-Mancillas 1987). Given the results of a recent nationwide Gallup Youth survey which found that 65 percent of the teens surveyed re-

ported "a fair amount" (46%) or "great deal" (19%) of cheating at their high schools (<http://www.gallup.com/content/print.aspx?ci=11644>), it would appear that no relief is in sight, as studies suggest that those who cheat successfully once are more inclined to cheat again, and with greater frequency (CAI 1998; Nonis and Swift 1998). In summary then, it is unlikely that future college students will be intrinsically motivated to avoid cheating opportunities as they arise.

It appears then that collegiate academicians will need to become increasingly proactive in their efforts to deter and detect academic dishonesty if students' behaviors are to change for the better. Surprisingly, many faculty (for many reasons) are unwilling to challenge or prosecute students engaged in academic dishonesty. Results of a 1999 survey indicate that one-third of the faculty respondents who suspected students of academic dishonesty chose not to pursue any course of action (CAI 2005). Doing nothing though, is a short-term no-win strategy; information published on the CAI website indicates that students are even more likely to cheat when an instructor has a reputation for ignoring academic dishonesty (CAI 2005).

The purpose of this session is to provide recommendations and information pertaining to policies, procedures, technology tools, and course/assessment design strategies which can help faculty to discourage, prevent, and detect various forms of cheating and plagiarism.

Panelist Karen James will begin the discussion with an overview of innovative test-related cheating techniques and will offer several recommendations for procedures and policies which can eliminate or minimize this form of academic dishonesty. Additional suggestions designed to minimize and detect plagiarism or unpermitted student collaboration will also be addressed, with an emphasis on the role played by technology.

Panelist John Bennett will follow with a discussion of how such measures may impact the professor-student relationship, and based on the results of his research, will address

whether students and their professors have different perceptions regarding what constitutes cheating. Bennett will conclude his discussion with additional ideas and recommendations for creating assignments that discourage cheating, or in which engaging in plagiarism is not advantageous to the student.

Panelist Rama Yelkur will conclude the panel's discussion with an in-depth review and demonstration of Turnitin (<http://www.turnitin.com/>), an online plagiarism detection service. She will share how this tool has helped her in classes which require written paper assignments. She will also discuss opportunities for individual, departmental, college-wide or University subscriptions to this service.

Session attendees will be encouraged to share examples of past cheating/plagiarism problems as well as their own methods for deterring or detecting cheating and plagiarism at the end of the session.

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John Bennett
Business Administration
University of Missouri, Columbia
Columbia, MO 65211
Phone: 573.882.7552
E-Mail: bennettjf@missouri.edu

Karen James
Management and Marketing
Louisiana State University, Shreveport
One University Place
Shreveport, LA 71111
Phone: 318.797.5017
E-Mail: kjames@pilot.lsus.edu

Rama Yelkur
Management and Marketing
University of Wisconsin, Eau Claire
105 Garfield Avenue
Eau Claire, WI 54702-4004
Phone: 715.836.4674
FAX: 715.836.2944
E-Mail: yelkurr@uwec.edu

DEVELOPING EFFECTIVE LEADERS: A LEARNING EXERCISE FOR THE SALES MANAGEMENT COURSE

Charles H. Schwepker, Jr., Central Missouri State University

We offer sales management at our university as an elective course. Although it can be taken for graduate credit, most of the students who take the course will not immediately embark upon a career in sales management. As such, I introduced an exercise in the course that is designed to put students on track to developing the skills necessary to effectively function as leaders in their future career, regardless of whether it is in sales management, as well as to become more effective in their lives in general. The exercise was adapted from a similar exercise introduced to me at a conference several years ago by a colleague, Buddy LaForge.

For lack of a more creative title, the exercise is called the “7 Habits of Highly Effective People Assignment.” The exercise involves reading the book *The 7 Habits of Highly Effective People* by Stephen R. Covey (1989). Although the book has been around for some time, it has valuable lessons that many students have yet to learn. The seven habits are: (1) be proactive; (2) begin with the end in mind; (3) put first things first; (4) think win/win; (5) seek first to understand, then to be understood; (6) synergize, and (7) sharpen the saw. Covey has since added an eighth habit, but I have yet to adapt the assignment to accommodate it, in part, because of the availability of this book used at a very attractive price (I bought mine used for less than \$5 including shipping). The book promotes developing these habits as a part of one’s daily life to become a more effective person. The exercise is designed to have students learn and begin to practice the 7 habits. What follows is the assignment:

The 7 Habits of Highly Effective People Assignment

1. After reading *The 7 Habits of Highly Effective People* (Stephen Covey, 1989, a Fireside Book published by Simon & Schuster) you are to prepare a typed paper (worth 50 points) that covers the following:
 - A. The first major part of the paper is a discussion of the 7 habits. The paper should have a separate subheading for each of the 7 habits. Under each subheading you should present one paragraph discussing what the habit means to you in your own words. Then, you should provide another

paragraph that discusses how practicing this habit could help make you a better sales manager.

- B. The second major part of the paper is a personal assessment and improvement plan. You should assess yourself using “The Seven Habits Profile” attached. Categories 1–7 correspond to Habits 1–7. Then, for each habit, discuss how you evaluate yourself (e.g., where you are strong and where you are weak) concerning the habit and present at least two things that you plan to do to improve your performance on the habit. Attach a copy of your completed “The Seven Habits Profile” at the end of your paper.
2. The second part of this assignment is to implement your improvement plan. Your job is to try to do the two things you selected to improve on each habit. You should keep some type of record of this improvement. I will not see this record, but you must submit two progress reports to me during the semester. Each progress report will consist of a one-page memo reporting on your progress toward achieving the two things that you planned to do to improve your performance on each habit, and a new Seven Habits Profile showing the improvements you have made on each habit. Each progress report is worth 10 points.

Generally, I set some time aside to discuss students’ thoughts concerning the book and what they have learned after they submit their report. The exercise, generally well received by students, offers several benefits. First, for something to become a habit it must be practiced over and over. By having students focus on activities for improving on the habits they are at least making an effort toward developing them. When implemented, these habits can help students to be more effective leaders. Second, the exercise offers students an opportunity to practice assessment (albeit, self-assessment), an important managerial skill. Third, it forces students to relate sales management concepts to what they learned from the book, thus reinforcing those concepts. Finally, students have a chance to work on their written communication skills via the report and memos.

Charles H. Schwepker, Jr.
Department of Marketing & Legal Studies
Harmon College of Business Administration
Central Missouri State University
Warrensburg, MO 64093
Phone: 660.543.8554
FAX: 660.543.8465
E-Mail: Schwepker@cmsu1.cmsu.edu

STILL WAITING TO TAKE THE PLUNGE? AMOS: A QUICK AND EASY WAY TO DO DATA MODELING

John Cherry, Southeast Missouri State University

In the doctoral program I went through, my colleagues and I were exposed to structural modeling, specifically LISREL, as possibly the most exotic, state-of-the-art, theory-testing tool available to researchers. To do LISREL analyses at that time, it was necessary to write line-by-line instructions, to specify a confusing variety of different matrices, and to do all this in Greek notation. These difficulties notwithstanding, a quick look at some of the better research journals in business shows that researchers are using LISREL and similar techniques not only to test theories, but to do a wide variety of sophisticated multivariate analyses. If you've not yet jumped into the game, it may be simpler than you think: SmallWaters Corporation's AMOS® software package (Analysis of Moment Structures) will do the same analyses for you, running inside the SPSS program, providing point, click, and drag simplicity all at once.

I'll start by enumerating some of the advantages of the AMOS approach. To begin, AMOS offers a graphical interface that basically allows you to draw your model – either a theoretical model, or simply the variables in a regression equation – as a series of boxes, circles, and arrows. Using the toolbar (and the toolbars, like most Windows-based products are customizable to users' specifications), you can simply open a window with the names of the variables in your SPSS data set, click on them and drag them to the appropriate box. After giving the arrows (the paths in the model, or parameters) names, and identifying error terms – again, all very straightforward – you can click a button, and out will come the analysis (more on the output, statistics, and interpretation below).

Perhaps the main advantage of AMOS is that, unlike regression models, it allows you to test the effects of independent variables on multiple dependent variables, and unlike MANOVA, allows you to measure the strength of association between predictors and criteria (these are standardized regression weights, with significance statistics provided for each). Also, unlike standard regression, you can compare regression weights across samples. For example, if I do a regression of education level → consumer ethnocentricity in a sample of U.S. and China managers, standard (and separate) regressions allow me

no opportunity to compare the weights of the path across samples. I can't answer the question: "does education level affect ethnocentric tendencies differently in the U.S. than in China?" With AMOS, this is not only possible, but rather simple as well. An additional benefit of AMOS is that it gives you the ability to run a one-degree-of-freedom test to examine whether the education level → consumer ethnocentricity path in the U.S. sample is significantly different from the same path in the China sample.

Whether you want to do some serious theory testing, develop and refine measures of interest, or just want to address some basic questions using regressions, AMOS is well-suited to the task. You can specify latent variables (as circles) or you can work entirely with observed variables (boxes). AMOS also allows you to conduct confirmatory factor analyses (measurement models), and lets you fit your constructs together into a theoretical whole (structural models), each time providing the standard set of "fit indicators:" the chi-square statistic, adjusted goodness-of-fit indices, root mean residuals, squared multiple correlations in the dependent variables (similar to adjusted r in regression). It's probably the experience of every path-modeler to find data that obstinately refuses to fit nicely onto the model. Note that contrary to usual experience (i.e., cross-tabulation tests of relationships), a LOWER chi-square value is what you're looking for; this indicates less deviation of the data from the model. Also you want to see chi-square significance values greater than .05, not less. In the case of large chi-square values and the dreaded $p < .05$ scenario, AMOS offers the modeler a handy little tool that indicates exactly where in the model a parameter could be changed. For example, a modification index "pointer" may indicate you should change the initial covariance between independent variables one and two by, say, 3.2, or perhaps add a path not present in the original model between two variables. The AMOS program indicates the improvement (reduction) in the chi-square value that will result from this change. Two caveats about using modification indices: first, think carefully about changing your model on the basis of sample findings – is the model really inadequate or is it possible your data doesn't represent the population? Note that if you change your model to fit your data, basically, you're

saying there's something wrong with the theory the model is based upon. Also, you compromise the ability to generalize your results. Another important issue having to do with modification indices: AMOS can't provide modification indices if there is any missing data from the variables being analyzed. So you'll need to make an editorial decision: whether to drop cases, or to use some other means (i.e., supplying the average value on the variables having missing data) to fill in the gaps. If the proportion of cases with missing data is small (e.g., five percent or less) deletion of the cases may be acceptable (Roth 1994).

Another caveat in using AMOS is that you should always and only use multi-item, interval or ratio-level (not categorical) measures of your constructs having reasonably high reliability (i.e., Cronbach's alpha $\geq .6$). Excessive "noise" in your data will cause the software to indicate that you should create paths between error terms in the variables with other error terms, or, worse, with other variables, a violation of the assumption of all multivariate procedures of the independence of error variance. In these cases, AMOS is basically telling you that you've left out a variable in your model. Here's a helpful hint that let me get a journal hit from some problematic data: if the scaling of your variables is not consistent (for example, "ethnocentricity" is measured with a semantic differential ranging from one to seven and educational level is a ratio measure from, say, one to twenty-one), you can use SPSS to generate homogeneous, standardized z-scores that will "behave" much better in the path analysis.

A few words about sample size: large samples are not needed with AMOS. Because the chi-square statistic is well-known to be extremely sensitive to sample size, larger samples will actually produce larger chi-square values, and your data will be harder to fit to the theoretical model. While you don't want to work with small samples for any number of good reasons, some guidelines are available in the literature: Stevens (1996) recommends 15 cases per predictor in your model, although Bentler and Chow (1987) note that researchers may use as few as five

cases per parameter (if the data are reasonably normally distributed). Finally, Loehlin (1992) recommends that if you have two to four factors, a sample of at least 100 is needed, with 200 being better.

An additional benefit of the AMOS program: the graphical user interface provides camera-ready illustrations of your model, complete with standardized path loadings, variances, and means of all relevant variables. Again, it's as simple as cutting and pasting the visual image into your manuscript. Last but not least, the manufacturer provides world-class support for AMOS users. Although the support personnel scrupulously avoid making substantive recommendations about, for example, improving the fit or helping with theoretical matters with which they're not qualified to comment, they can help with more basic matters like interpreting modification indices, or diagnosing models that just won't "run." When I recently upgraded my computer and needed to re-install the software, I couldn't find the user key to complete the installation. After contacting the support center, no fewer than three different individuals emailed me back with my pass code.

So go ahead, and see how easy it is to get modeling. Even the most lackluster data is considerably more appealing when the visual element – the boxes and arrows, the fit indicators – is there to complement the analysis.

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John Cherry
Department of Management and Marketing, MS5875
Harrison College of Business
Southeast Missouri State University
Cape Girardeau, MO 63701
E-Mail: jcherry@semo.edu

THE ROAD WE HAVE TRAVELED: USING STUDENT PORTFOLIOS TO ASSESS TEACHING EFFECTIVENESS

Catharine M. Curran-Kelly, University of Massachusetts Dartmouth

I was teaching Global Marketing in Spring, 2002 in the aftermath of 9/11 I was having difficulty deciding how to approach this subject. A number of publications and authors had been laying at least part of the blame for 9/11 at the feet of marketers. The incessant expansion of Western Culture through products and services as well as media were often reasons cited for underlying the. I decided that I needed to incorporate some of these debates into my classroom. What role did marketing play in the increasing tension between what author Tom Friedman has termed "The Lexus and The Olive Tree?"

I began collecting material for this course. I decided that I would supplement my traditional text with readings from a wide variety of sources, mostly outside of business. Many were very difficult reads, some were ever extremely critical of the U.S. and corporate America others were more historical or philosophical in nature. I also included a number of student directed mini-projects and reports. When I looked at the assembled material I realized that traditional testing was not going to be able to tell me whether or not the students had learned all that I had hoped from this array of materials and activities. I decided to do something radically different and use student portfolios and an oral final exam. The initial enrollment in the class was 35 students, quickly that dropped to 28 and ultimately 25 completed the course. Thus began our journey into my new course "Globalization and Marketing."

I decided to use Portfolios primarily because I needed to ensure that students would reflect on what they had read and what we had done in class that week in order to digest this material. I required that every week the students write a reflection paper. Just a short one page paper in their notebooks. I left this assignment very open ended they

could choose any format for this paper. Some wrote essays, others wrote lists of questions they had about the material they read. Some pointed to paradoxes they had found in the reading. It was up to the students if they wanted to share these with me or not. In addition to the reflection papers I required that they keep all of their written assignments from the semester in their notebooks. I was only going to be collecting their notebooks at mid-semester and then together we would review them at the end of the semester.

There is a wealth of research on the use of portfolios to assess teaching effectiveness. My experience is that the primary benefit is that the students develop a sense of how far they have traveled on the class journey. Many students read assignments once and over the course of the semester they don't incorporate the material that has come before. The portfolio requires that students periodically revisit all of the course materials and integrate them with the new material. Thus when I held my oral finals at the end of the semester the students were able to use examples from the first few weeks of class to support their points.

One caution that I do have about using portfolios is that it is very time consuming for the faculty member. The portfolio review, though fascinating, does take a significant amount of time. In my case it was essential to test the new format but I doubt I would try it again in such a large class. The oral final was also a very interesting experience for both the students and for myself. The students in some cases were surprised by the depth of their understanding of some of the more complex issues from the course. Overall I was pleased with the outcomes but once again it was an extremely time consuming process.

Catharine M. Curran-Kelly
Charlton College of Business
University of Massachusetts Dartmouth
385 Old Westport Rd.
N. Dartmouth, MA 02747
Phone: 508.999.8431
FAX: 508.999.8646
E-Mail: ckelly@umassd.edu

TEACHING THE MARKETING MANAGEMENT COURSE: CHALLENGES AND SUGGESTIONS

Rene Desborde, Kentucky State University

The marketing management course is often taken as a capstone course by students specializing in marketing at both the undergraduate and graduate level. Arguably, the primary objective of this course is to get students to effectively use and integrate a variety of important marketing and/or management tools and concepts in the analysis and solution of marketing management problems. The purpose of this position paper is to identify some of the challenges associated with teaching this course and to offer suggestions to address them. These suggestions are based on my past experience in teaching the course, and they seem to have worked reasonably well, given the feedback received from students.

A first challenge is to find the right balance between a concise but necessary review of fundamental marketing ideas and techniques introduced in the principles of marketing course and the assignment of marketing cases. There are currently few textbooks which provide such a balance. The text that I am using presently (*Marketing Strategy*, 3rd edition, Ferrell, South-Western 2005) has twelve chapters and twenty cases. This allows me to cover the chapters during the first half of the semester as a preparation for the group case assignments given during the second half of the semester.

A second challenge is to introduce students to the case method and to provide them with a framework which allows them to develop their analytical skills and to bring structure and consistency to their treatment of cases. This is accomplished by asking them to use a seven step process (borrowed from a previous edition of the current

textbook): (1) Situation Analysis, using the SWOT (Strengths, Weaknesses, Opportunities, Threats) framework. (2) Identification of Missing Information. (3) Problem(s) Statement. (4) Development of Alternatives. (5) Evaluation of Alternatives and Recommendation. (6) Implementation. (7) Evaluation and Control.

A third challenge is to get students to handle marketing problems, issues and decisions just like actual marketing executives would in the real world. This is done by asking students to engage in role playing, i.e., students presenting the cases pretend to be outside consultants hired by the company to analyze its problems and make recommendations to members of top management. The other students in the class, as well as myself as the instructor, pretend to be members of top management and get actively involved in providing feedback to the consultants' recommendations.

A fourth challenge is to get students to understand the critical importance of market based strategic planning if a company is to survive in the long run. This is best accomplished by asking students to present, at the beginning of their presentation, a historical overview of the company, based on materials found on its website and in the case, and to pay particular attention to how the company reacted – or failed to react – to changes taking place in its external and/or internal environments.

It has been my experience that the suggestions summarized above seem to stimulate students' interest and thinking and to keep them actively involved.

Rene Desborde
School of Business
Kentucky State University
400 East Main Street
Frankfort, KY 40601
Phone: 502.597.6907
FAX: 502.597.6404
E-Mail: rdesborde@gwmail.kysu.edu

TECHNIQUES AND STRATEGIES FOR USE OF CASE STUDIES IN MARKETING MANAGEMENT AND STRATEGIC MARKETING MANAGEMENT COURSES

James R. Maxwell, Indiana State University

ABSTRACT

Marketing case studies provide context for analysis and decision-making designs in different business situations, companies, and industries. In most marketing courses, students use cases about actual companies to practice strategic marketing analysis and to gain some experience in the tasks of crafting and implementing marketing strategy. A case sets forth, in factual manner, the events and organizational circumstances surrounding a particular marketing managerial situation. The purpose of this paper is to look at why case studies are used, problems using them and recommendations using standard and innovative methodologies for using them effectively.

THE NEED FOR CASES IN MARKETING MANAGEMENT AND STRATEGIC MARKETING COURSES

Teaching and learning about marketing, businesses and the environment in which they operate is contained within a business curriculum but context and events in which business operate are constantly changing. The case method is an effective avenue for sensitizing students and faculty to the complexities and structures of business organizations.

The case method is an effective avenue for sensitizing students and faculty to the complexities and structures of marketing organizations. Cases are not intended as examples of either weak or exceptionally good marketing practices. Nor do they provide examples of particular concepts. Marketing faculty that use case analysis methods are up-dated as to current techniques, successes and failures of business allowing them to stay current. Marketing cases are one of the most effective and convenient ways to introduce practice into the classroom, to tap a wide variety of experiences, and involve students actively in analysis and decision-making. Cases are not intended as examples of either weak or exceptionally good management practices. Nor do they provide examples of particular concepts.

There are many positives to case study analysis. Marketing faculties who utilize case analysis methods stay current as to current techniques, successes and failures of business.

The case approach to strategic analysis is, first and foremost, an exercise in learning by doing. Cases help substitute for on-the-job experience by (1) giving broader student exposure to a variety of industries, organizations, and strategic problems; (2) forcing student to assume a managerial role (as opposed to that of just an onlooker); (3) providing a test of how to apply the tools and techniques of strategic management; and (4) asking student to come up with pragmatic managerial action plans to deal with the issues at hand.

Cases also provide an opportunity for student to enhance their business decision making skills, accommodate alternative points of view and reinforce business content.

ISSUES USING CASE STUDIES IN BUSINESS COURSES

In responding to this context one solution is to construct and use case-studies, but there are some issues to the use of case studies. They can be time-consuming, expensive to produce, need constant up-dating, and may not be proper for some classes.

Marketing studies gains much of its appeal because of its perceived relevance to the modern world. Teaching and learning about marketing to business firms and the environment in which they operate is contained within a curriculum but the context and events in which they operate are constantly changing. The inter-related and dynamic nature of this environment means that firms have to constantly analyze this environment and adjust strategies to take account of changing events.

Educational publishers produce mainstream text resources, such as books, for classroom use in schools and colleges throughout the world. These core resources provide tradi-

tional and necessary resources for students. However, in a modern and active learning environment that is constantly changing, even though these texts will contain case studies, both instructors and students want more than dated material from textbooks to bring subjects to life. Information within case studies in textbooks is often second hand and adapted from articles in marketing and business magazines. Cases tend to be short, limited and have been repurposed for educational use, with a subsequent loss of usefulness.

Students are more likely to transfer knowledge if they can link their learning to current relevant issues. In particular, in the field of business, where the world is ever changing, instructors look for resources to reflect all of the events within the external business environment that complement lessons learned from textbooks. The behavior of and decisions made by managers of all different types of firms provide a basis for students to understand how course material is mirrored within a business environment. However this implies using a curriculum based on material that, unlike most mainstream texts, draws on active management practices and environmental demands.

Most case study material concerning the actions, strategies, financial perspectives, and behaviors of firms are not readily available. Even with the advent of the Internet and easy access to information, the material and information is available is of little or no value, as it is aimed at potential investors and/or for educational purposes.

In the marketing curriculum many details of functional areas with a firm are missing or excluded from case studies. Many courses in functional areas are based on human resource management, production and operations management, management information systems, marketing strategy, which many business cases lack information and detail on. Much of this required information may be significant to the student's analysis of the case which lacks important information that may be relevant to the student's overall analysis of the case which is lacking.

Other issues of concern are that case studies are very time consuming in the data collection and analysis stages (Becker 1998; Bryman and Burgess 1994; Denzin and Lincoln 1994; Schratz and Walker 1995).

Marketing case studies must be effective as it relates to the business curriculum is called theory-seeking and theory-testing (Adelman et al. 1980; Bassegy 1999). Some marketing cases are actually developed by researchers who have no education or experience in business.

Businesses pay to contribute – and distribute – the case studies which must conform to requirements which en-

sure classroom materials are relevant, rigorous, up-to-date, and unbiased: cross-referenced to the curriculum; both practical- and theoretical; designed to enrich classroom experiences; ethically-based, taking into account the advice of teachers.

Teaching and learning about business firms and the environment in which they operate is contained within a curriculum and the context in which firms operate is constantly changing. A solution is to use case studies because case studies are an excellent way of showing how business skills must be applied with a particular context. Business and marketing organizations should pay to contribute and distribute the case studies. The researcher ensures that they conform to requirements that classroom materials are: relevant, rigorous, up-to-date, and unbiased; cross-referenced to the curriculum; both practical and theoretical; designed to enrich classroom experiences; ethically based; and take into account the advice of teachers.

Lawyers and physicians use the case method to identify precedents and cases have been used to represent groups of similar events or symptoms. Future practice has been informed by past history and the case method has become so authoritative, that training within these professions has become heavily based on the case method.

Since then there has been some progress towards identifying the factors which define a case study. There is widespread agreement that a case study is of "real life," is holistic and it enables the investigation of the relationships between the component parts of the case. In his classic book on case study, Yin (1994) points out that a case study is an empirical inquiry that allows investigation into a contemporary phenomenon within its real-life context. The case study answers why and how question (Robson 1993). Human systems develop an integrity about and investigation of patterns that emerge from interdependencies (Sturman 1994) and (Stake 1995).

CASE STUDIES SHOULD BE PRODUCED ECONOMICALLY

Each firm that has case study being developed about the organization should pay some portion of an economic fee for the process. This would provide an incentive to the participative firm to that the case study of their firm would provide attractive and up-to-date materials that both students and instructors would value. At the heart of the process was the need to keep the project heavily educationally-focused and theoretically-based in order to show students that work within the classroom had relevance in the business world. The case studies should needed information, data and metaphors that would help to improve classroom practice and empower students to develop

higher levels of response within assessments. In order to do this each case has to be interesting, current, and rigorous. Cases should include a variety and range of information concerning things such as new promotions, improved targeting and segmentation and analyzed the affect of a number of strategies such as the launch of new products and their position in the product life cycle.

CASE STUDIES SHOULD BE CHALLENGING AND UNBIASED

Before the study is performed, the case study researcher and the sponsoring firm should totally agree on the curriculum needs and requirements. Data collection usually depends upon the sponsor of the study. Although some studies have been written on the basis of personal interviews, others have been developed after access had been gained to what had before been confidential data. It should be agreed by the researcher and sponsoring firm that the case study will be ethically based. The purpose of this is to ensure that sponsoring firms do not present their promotional materials for the sake of sales or increased market share.

CASE STUDIES SHOULD BE CURRENT

Case study researchers need to develop an assessment or mechanism for analyzing and responding to feedback from the educational community concerning the case study. Evaluation involved feedback from questionnaire analysis and focus group activity with both students and instructors could be invaluable. Case studies are generally used in business classrooms, not just as reference information, but also to develop a much deeper understanding of business issues through the process of case analysis. They also actively develop student's analytical skills, by learning to organize, assess, classify and evaluate data presented in the case studies. Case studies also develop student's theoretical knowledge increasing their ability to transfer concepts.

CASE STUDY COLLATERAL

Today there are more instructors' resources and collateral than ever before. Some of these assets include the following:

- ◆ Information packets on improved delivery performance;
- ◆ Curriculum matrix cross-references of cases;
- ◆ Instructor's Manuals;!
- ◆ Instructor and Student Supplements;
- ◆ CD-ROM and web sites that students and instructors can access 24 hours a day, 360 days a year with real-time updates to the cases and firms be studied and analyzed.

CASE STUDIES SHOULD BE RELEVANT TO THE COURSE AND CURRICULUM

Case studies should be cross-referenced to the curriculum and be both practical and theoretical. The case study should consider how the actions of the participating firm could be interpreted and synthesized in such a way that students can develop insight into the world of business. In most cases firms respond positively to advice upon the educational value of their firms study. Better-focused studies tend to be those that are more widely used. One of the problems is that they also want their study to be as interesting and informative as contributions from other organizations.

Case studies should enrich classroom experiences. The starting point for every case study should be the curriculum. Studies also have to be ethically based, taking into account the advice of instructors, departments, and the college.

The process of using case studies to draw out learning outcomes was relatively new for many instructors of business programs, particularly those from accounting and skills backgrounds. Case analysis in business has provided a vehicle for students to examine current issues using both objective and analytical skills as well as develop both creative and co-operative approaches within the classroom. Realism has become a powerful tool in this learning process, enabling students to link tasks similar to those that they may be asked to require to undertake in a workplace. The use of case analysis also provides young people with the theoretical knowledge and skills required to become "creative problem solvers" that employers find so valuable.

SUGGESTIONS FOR UTILIZING MARKETING CASES

There are many ways to use cases. Some instructors prefer to generate open class discussion. Others prefer to assign cases to student teams for oral presentations. Most like to have students write an analysis of at least one case during the course, often as a final examination.

OPEN CLASS CASE DISCUSSION

One case approach used is for the instructor to lead the discussion with penetrating questions and answers. The many prefer to begin the analysis with a few key questions and hope to get the students to take over the discussion. The instructor then tends to fade into the background or puts key points on the blackboard or dry erase board. This approach may work very well for graduate students but fails miserably with undergraduate students. As shown in

Exhibit 1, the “typical” undergraduate strategy class needs much more pushing and prodding by the instructor to keep discussion moving than do most graduate classes. Some suggested steps to get open class case discussion going in either type of class are:

1. Read the case over carefully before class. Then study the case. Calculate common size financial statements and adjust for inflation. Any obvious problem areas?
2. Read the teachers notes for the case. Use the instructor’s manual! Read previous student papers if possible.
3. Decide how you’re going to run the class. What key points need to be addressed? Can you break the class up into teams and have them role-play or analyze certain parts of the case and present them to the class? Prepare an outline if how you would like the discussion to go and guess how much time is needed per major point.
4. Put together a usable seating chart. If the class meets for a long period of time, ask students to make their own name cards and to bring them to class each time. Take pieces of paper and magic markers for them to use at the first meeting (1 marker for each row in the class). Be prepared to keep track of discussion in pencil on your seating chart. If you call on students, mark a check next to their names. If the answer is very good, put a + next to the check. If someone answers poor, place a minus next to the check. If someone volunteers, mark a straight line next to the name. If it’s a great comment, make it a plus sign. You can do this either during class or immediately after (if you have the time). Then transfer your marks to a separate sheet with dated columns.
5. Start with the basics. Call on someone to state the basic facts of the case. Ask him to her describe the firm. When was it founded? What does it make? How well is it doing? The first undergraduate will probably respond in terse sentences such as, “It makes electronic parts.” Getting more information may require you to play dentist – pulling sentence fragments out like teeth. “What kind of electronic parts? Who buys them? How are they made? How are its sales? Is it profitable?” As the typical undergraduate begins to falter and skims wildly through the pages in the book, we hope you will hear from a volunteer. Keep rolling.
6. Go through your outline section by section. Put the topic headings on the blackboard as they are discussed and write in key points under each. Remember to leave enough time to develop alternatives with pros and cons for each. Force the class to make a decision. Have them personally vote for their desired alternatives; then push them to justify these. Give yourself five minutes at the end of each class to sum up the discussion and to point out the key learning objectives of the case discussion. Above all, try not to carry a case over to the next class meeting. Students

will typically have forgotten it completely by then and all momentum will be lost. If you have to carry it over, summarize the previous discussion and then ask students to write their solution on paper to hand in like a pop quiz. Everyone will want to justify their personal solution orally after they hand in their paper. You will probably have a hard time closing down the discussion!

7. As a final note, you may wish to tell students what actually happened to the firm in the case (if you know). They enjoy hearing a postscript. Please remind them, however, that there is no one best solution. Encourage creativity. Above all, start writing some cases yourself. It will give you a lot more confidence as a case discussion leader.

STUDENT ORAL PRESENTATIONS

A second approach to using cases is the student oral presentation. By the second or third day of class, the students are placed into teams, each composed of three to five people. Each team is the assigned a case to present during the semester. This approach may be used during the second half of the semester instructor chooses to lead open discussion during the first half. It may also be used during the first half instead of open class case discussion if a simulation or project is planned for the second half of the course. Among its advantages are:

- ◆ The instructor gets off stage and is no longer responsible for case analysis.
- ◆ The students develop important presentation skills as well as learning how to handle.
- ◆ Students are under pressure in a questioning period.
- ◆ The level of analysis is typically deeper than in the average open class case discussion, (unless the instructor is extremely competent in leading cases or the students are unusually motivated to prepare for the discussions).

Be sure and focus efforts of suggestions and recommendations to the first presenting team to set the stage for the rest of the presentation teams. If it is done well, the other presenting teams will most likely do well. If it goes poorly, the rest of the presenting teams will probably not do well either and be of low quality. The biggest disadvantage of the student oral presentation is that unless something else is assigned, most undergraduates and a large number of graduate students who are not presenting will only superficially read the case. They are likely to hold back from asking any penetrating questions of the presenting group and may choose to skip classes when they are not themselves presenting. It is recommended that the instructor assign at least some written analysis to a couple of non-presenting teams. The instructor should also give fairly comprehensive feedback to the presenting team within a week of the presentation. Another suggestion is to require

all students to complete a form critiquing the oral presentation. Comments may compose a participation grade. Don't schedule all oral presentations back-to-back intermix them with lectures or open class discussions.

WRITTEN CASE ANALYSIS

There are at least three approaches to use with written case analyses. One is the comprehensive student report that covers all the issues in the case in a complete manner including references and exhibits (ratios, pro forma's, product life cycle drawings, etc.) A second approach is the short report prepared in response to a specific question. A third approach is the strategic audit. It forces the student to do a complete strategic analysis as in the comprehensive report, but it is only a three- to five- page outline and is quick to read and easy to grade.

Both the short report and the strategic audit are useful during open class case discussion in order to ensure adequate student preparation for class. The instructor's job as discussion leader is made much easier as students complete with each other to orally "sell" their points of view in class. Good arguments can develop. The instructor may use the blackboard to list the pros and cons of each argument and ask for a student vote on the issues. The short report and the strategic audit are also useful adjuncts to student oral presentations. If two or three teams bring completed reports or audits to class on the same case being presented orally, much more interest is generated in class during the presentation.

GRADING OF WRITTEN COMPREHENSIVE CASE REPORTS

The grading of a written comprehensive report is often aided by the use of a case evaluation form such as the one suggested for oral presentations. These forms help to ensure that the instructor considers all aspects of case analysis and provides the students with clear-cut comments on key aspects of the report. In the case of a written report, a suggestion would be to include the following:

- A. Legibility
- B. Length of report
- C. Organization of report
- D. Spelling and use of grammar
- E. Effectiveness of writing style
- F. Use of references and exhibits

STRUCTURING THE COURSE

Unless the class is very familiar with the case method, we recommend that the students carefully read the chapters or readings assigned relative to the case learning methods. Many times appendices are available and useful. Begin

the case analysis in the class with a consideration of key strategy makers and corporate governance. Consequently, we like to begin with open class discussion of case assigned. The next logical step deals with questions of social responsibility, ethics and environmental factors. More complex and comprehensive strategic management and marketing cases follow.

The next cases that might be considered deal with many aspects of strategic management or marketing and (for the most part) are equally appropriate for oral presentations, written reports, and strategic audits. These can be assigned depending on the steps they emphasize in the strategic decision-making process and/or on the basis of difficulty/complexity. They range from large business corporations to small, entrepreneurial firms and are organized on the basis of industry.

Some of the cases can be used in conjunction with other cases to emphasize a particular issue or strategy, such as growth through acquisitions, retrenchment, or entrepreneurial ventures.

It is recommended that the marketing cases be categorized by decision process and level of difficulty. The level of difficulty and complexity is categorized by the following:

- ◆ **Early Use Cases**
These cases are generally easier to analyze and tend to generate a good level of student interest and enthusiasm. Number crunching is reasonably low.
- ◆ **Mid-Semester Cases**
These cases tend to be a little more complicated and involve more number crunching or analysis.
- ◆ **Late Uses Cases**
These cases are generally very complicated and fairly difficult to analyze. They require a lot of analysis and number crunching.

There is no "correct" answer to any case. There may be several "good" answers and many poor ones. The purpose of strategic management, marketing, and entrepreneurship course discussions should be to help the student to understand the nature of "better" answers, what to look for, how to analyze alternatives, and how to see through the complexities of arriving at and implementing solutions in real organizations. The total number of variables in a real strategy situation is typically beyond the capacities of any one person or group to control them all. Hence, the students should be warned that they should not rely on what a company actually did to be a thorough guide to action. The company may have succeeded or failed – not because of its specific decisions – but they are in the right place at the right time currently. We all know that in a dynamic environment that their continued success will probably be challenged.

Despite their complexity, cases should be kept brief or as short as possible. Many are written in a lively style that captures some of the flavor of the real organizations.

Many times there are “decision points” in good business cases, however, case materials immediately following such decision points consciously leave out much of the detail on what actually happened so that students can arrive at their own specific solutions. They later see these in the context of a longer horizon—much like a mystery story that unfolds in phases. They should analyze the specific situations, consider alternatives, and arrive at explicit conclusions—understanding the later events might have looked a bit different if their solution had been implemented. As in any good mystery story, the case provides many clues—never quite all those actually present—but, surprisingly, often more than most executives would have had time to absorb in the real situation.

It is believed that no “canned” approach is viable for all strategic marketing situations’, the best approach is the use of cases that cut across a variety of issues and theoretical constructs.

Case studies can be taught in a variety of sequences. It is recommended that a extra cases be used for three purposes: (1) as possible examination cases which students do not already have access to, (2) as extra cases to increase emphasis selectively on one or another sections of your course or to expand the conceptual material, and (3) as extra cases to create industry groupings of cases.

STUDENT PREPARATION AND CLASS DISCUSSION USING CASE STUDY METHOD

Many cases have a few questions at the end of most of the cases. These are designed to help students see relevant issues, but not limit or channel their thinking. Students generally find such questions helpful in organizing their thinking about the case. However, it is recommended that you substitute your own set of questions designed to achieve your own specific objectives. Whatever the questions, students should also be expected to do the following in preparation for class discussion: understand the facts (by underlining them or whatever), identify the main issues presented by the case and cluster the facts around those issues, lay out feasible alternatives for action, evaluate those alternatives, choose the “best” one, and consider issues of implementation relative to that of course of action.

Students who have followed this process should be able handle any questions you pose in the class itself. We believe that the class discussion should build on their preparations and carry them into further depth rather than require students to recite the results of those preparations.

Many cases have teaching notes that organized to facilitate this level of discussion. They provide a thorough outline of how the case can be taught, key questions, concepts, and analytical data needed. Because the cases are complex, the teaching notes are purposely quite thorough. A skilled academician should have little difficulty teaching case method.

There is no “correct” answer to any case. There may be several “good” answers and many poor ones. The purpose of strategic marketing discussions should be to help the student to understand the nature of “better” answers, what to look for, how to analyze alternatives, and how to see through the complexities of arriving at and implementing solutions in real organizations. The total number of variables in a real strategy situation is typically beyond the capacities of any one person or group to control them all. Hence, the students should be warned that they cannot rely on what a company actually did to be a thorough guide to action. The company may be succeeded or failed—not because of its specific decisions—but because of luck, an outstanding personality, the bizarre actions of an opponent, international events over which it had no control, and so on. One of the products of a successful strategy discussion should be to bring out the full dimensions of these “unknowables.”

Many professors choose to limit the students to using only the materials contained in the case. This keeps the students from “second guessing” the top management’s decisions. On the other hand, other professors may find it useful to allow the students to do whatever library research they wish. This allows the cases to remain vital and living, up through today’s headlines. Very often, issues developed in the case will show up in *The Wall Street Journal*, *Business Week*, *Fortune*, or other business media during the week in which the case is taught.

Written assignments can easily be developed using discussion questions and teaching notes for each case.

In addition, the devices described below can be used to integrate concepts presented in the chapter text with the case material.

GRADING OF WRITTEN COMPREHENSIVE CASE REPORTS

The grading of a written and oral comprehensive report is often aided by the use of case evaluation forms. Items to be addressed in the form or legibility, length of report, organization of report, spelling and use of grammar, effectiveness of writing style, use of references and exhibits, environmental scan assessment, problem identification, achievement of goals and objectives, strategy formulation, implementation and audit assessment and recom-

mentations. Written assignments can easily be developed using discussion questions and teaching notes for each case.

ADDITIONAL GUIDELINES FOR PREPARING CASE ANALYSES

We never have all the information to make decisions because of unavailability, cost, or time constraints. So, be practical and make assumptions based on the information available.

There is no one best solution to a case study. The justification for the students recommended strategies are what are important, not knowing the actual solution or decision.

No organization can possibly pursue all the strategies that could potentially benefit the firm. One must be realistic. Estimate how much capital will be required to implement what you recommend.

Never make generalizations about cases. Be specific by telling what, why, when, how, where, who, and describe material clearly.

Encourage students to be open-minded and to be creative and original. Do not necessarily recommend the course of action that the firm plans to take or actually undertook, even if those actions resulted in improved revenues and earnings. Some additional recommendations in structuring your course:

- ◆ Categorize your cases by strategic decision-making process.
- ◆ Establish strategy formulation in the beginning of the course, implementation, evaluation, and control toward the end of the course.

There are other types of case studies that will be presented, but the majority of different case study methods are variations to the above methods.

CASE STUDY CONSIDERATIONS IN THE 2TH CENTURY

Although the curriculum changes every four or five years, the external environment in which business education should be taught is constantly changing. The sponsorship of case studies, written by researchers in higher education for the business classroom, has been widely supported by instructors. Case analysis has become both a learning and assessment tool. This is not to imply that other areas have a static external environment and it could well be argued that other areas of the curriculum such as science, design and technology, information technology could learn from this as a way of meaningfully linking theory and practice.

1. Business education will have increased emphasis upon the importance of developing knowledge-based strategies. Sponsors of educational resources seem to be learning more about education and their own practices as learning organizations. Though this process decision makers from many of these organizations have developed a fuller understanding about learning practices, which they then have the capability themselves to use.
2. It is obvious that case studies are an important solution to meeting the needs of business students to develop a full range of skills such as analytical skills and logical judgment, communication skills and self-analysis skills, to which Eason (1982) has attributed the term “creative problem solving.” Case studies within groups help students both to improve their depth of learning and their intrinsic motivation by moving them away from more passive classroom techniques to situations where they participate more actively (Liao 1996).
3. The Internet will provide faster and more accurate information and feedback.
4. The expanded utilization of nanotechnology will have a tremendous positive impact on case study methodology by providing significant information immediately.

ADDITIONAL CONSIDERATIONS

1. The effect upon the curriculum and how it is delivered – this kind of resource could develop a new autonomous kind of learner, with a range of skills, developed partly upon the basis of their experiences with case analysis.
2. Feedback on the method is built into the method. As we learn more about case study both the quality of the studies and their ability to provide experiences for analysis should lead to continual methodological refinement.
3. The potential for teaching and learning using case analysis to develop student levels of response in assessment situations.
4. The different uses of case study by teachers within classroom situations.

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James R. Maxwell
Indiana State University
TC219D – John Myers Technology Building
200 North Seventh Street
Terre Haute, IN 47809–9989
Phone: 812.237.3623
E-Mail: jmaxwell2@isugw.indstate.edu

ASSESSMENT ACTIVITIES FOR MARKETING CURRICULUM

Robert H. Luke, Missouri State University

Today's business schools are faced with significant pressure from various publics to provide adequate validation of scholarly activity and program excellence (assessment):

1. The public of the state (usually through their legislators) require "proof" of adequate teaching and preparation for future careers of institutional graduates.
2. Upper administration at each academic institution requires assessment pedagogy/findings that provide them a good defense in justifying their mission and goals statements.
3. Accrediting agencies (for example, AACSB International for business) are now requiring ongoing assessment plans with specific requirements.
4. Many state's Coordinating Boards for Higher Education are requiring assessment as a prerequisite for budget preparation and distribution.

As a result of these pressures, colleges and universities are entering a world of self analysis through assessment of all programs, mission statements, and major academic plans.

Most colleges and universities have had criteria to measure their success. Some of these indicators have included ACT/SAT scores of entering students, acceptance rates, graduation rates, career employment percentages and where graduates are hired, ratings in magazines, etc. However, only during the past decade has the term "assessment" been used as a favored lever to evaluate colleges and universities against their past performance and between institutions for funding on the state level. Accrediting agencies such as the AACSB International have now made assessment a part of their accreditation requirements. They title such assessment as "Assurance of Learning" and it is included in the Standards 15–19, of their document titled "Eligibility Procedures and Accreditation Standards for Business Accreditation (Revised January 01, 2005) to wit:

ASSURANCE OF LEARNING STANDARDS

15: Management of Curricula: The school uses well documented, systematic processes to develop, monitor, evaluate, and revise the substance and delivery of the curricula of degree programs and to assess the impact of

the curricula on learning. Curriculum management includes inputs from all appropriate constituencies which may include faculty, staff, administrators, students, faculty from non-business disciplines, alumni, and the business community served by the school.

The standard requires use of a systematic process for curriculum management but does not require any specific courses in the curriculum. Normally, the curriculum management process will result in an undergraduate degree program that includes learning experiences in such general knowledge and skill areas as:

- ◆ Communication abilities.
- ◆ Ethical understanding and reasoning abilities.
- ◆ Analytic skills.
- ◆ Use of information technology.
- ◆ Multicultural and diversity understanding.
- ◆ Reflective thinking skills.

Normally, the curriculum management process will result in undergraduate and master's level general management degree programs that will include learning experiences in such management-specific knowledge and skills areas as:

- ◆ Ethical and legal responsibilities in organizations and society.
- ◆ Financial theories, analysis, reporting, and markets.
- ◆ Creation of value through the integrated production and distribution of goods, services, and information.
- ◆ Group and individual dynamics in organizations.
- ◆ Statistical data analysis and management science as they support decision-making processes throughout an organization.
- ◆ Information technologies as they influence the structure and processes of organizations and economies, and as they influence the roles and techniques of management.
- ◆ Domestic and global economic environments of organizations.
- ◆ Other management-specific knowledge and abilities as identified by the school. [MANAGEMENT OF CURRICULA]

16: Bachelor's or undergraduate level degree: Knowledge and skills. Adapting expectations to the school's mission and cultural circumstances, the school specifies learning goals and demonstrates achievement of learning

goals for key general, management-specific, and/or appropriate discipline-specific knowledge and skills that its students achieve in each undergraduate degree program. [UNDERGRADUATE LEARNING GOALS]

17: The bachelor's or undergraduate level degree programs must provide sufficient time, content coverage, student effort, and student-faculty interaction to assure that the learning goals are accomplished. [UNDERGRADUATE EDUCATIONAL LEVEL]

18: Master's level degree in general management (e.g., MBA) programs: Knowledge and skills. Participation in a master's level degree program presupposes the base of general knowledge and skills appropriate to an undergraduate degree. Learning at the master's level is developed in a more integrative, interdisciplinary fashion than undergraduate education.

The capacities developed through the knowledge and skills of a general master's level program are:

- ◆ Capacity to lead in organizational situations.
- ◆ Capacity to apply knowledge in new and unfamiliar circumstances through a conceptual understanding of relevant disciplines.
- ◆ Capacity to adapt and innovate to solve problems, to cope with unforeseen events, and to manage in unpredictable environments.

Adapting expectations to the school's mission and cultural circumstances, the school specifies learning goals and demonstrates master's level achievement of learning goals for key management-specific knowledge and skills in each master's level general management program. [MASTER'S LEVEL GENERAL MANAGEMENT LEARNING GOALS]

At Missouri State University (which is up for reaffirmation of accreditation in 2007), this will be the first time we are being reaccredited under the "new" guidelines established several years ago. Under the new guidelines, colleges and universities are supposedly able to tell the AACSB what they wish to be, how they plan to get there, and how they measure themselves toward their position. While this is all well and good, the AACSB still makes minimum standards that cannot be ignored.

In following the AACSB Standards 15–19, the Marketing Department was required to develop an assessment plan that would address the challenges of assessment doctrine. To do this, the department was asked to develop "core competencies" that would be included in the core classes within the department (those courses that were to be taken by all College of Business Administration [COBA] stu-

dents). The following Assessment Plan was developed for the Assessment Office of the University:

**Marketing Department
Assessment Plan
Prepared for
Dr. Martha Kirker, Director
Center for Assessment and Instructional Support**

March 19, 2003

Program Overview

The SMSU Marketing Department is one of six departments in the College of Business Administration. The degrees offered in Marketing include the Bachelor of Science in several different Option Areas: Advertising and Promotion; Logistics and Transportation; Marketing Management; Marketing Research; Retailing/Merchandising and Sales/Sales Management. In addition, the department offers Marketing Minors in Advertising and Promotion; e-Business; International Marketing; Logistics and Transportation; Marketing; Retailing/Merchandising and Sales/Sales Management. The Minors are usually 18 credit hour programs. Enrollment is on a full-time or part-time basis. The programs are accredited by the AACSB the International Association for Management Education at all four levels. As part of the requirements for accreditation, the programs must have an ongoing plan for self-assessment and evaluation, and this plan is reviewed on a regular accreditation schedule.

Program Mission and Objectives

Central Mission

To continue to develop and improve the quality of Marketing academic programs at the undergraduate and graduate level for the single purpose of developing educated persons.

General Objectives

The COBA and Marketing Department general objectives include such items as:

1. To continue monitoring departmental activities to assure conformity with AACSB standards.
2. To continue to 1) recruit, based upon departmental needs and budgetary realities, and in accordance with affirmative action guidelines, terminally qualified faculty from nationally recognized graduate programs who are committed to teaching, research, and service consistent with the mission of the Department of Marketing, COBA, and the University.

3. To assist in providing direction, counsel, and support for the COBA.
4. To continue the use of appropriate computer software for monitoring critical doctoral coverage, student-teacher, and day-night ratios to assure conformity with AACSB standards.
5. To continue working closely with the Office of University Relations to promote activities of the Department.
6. To continue to implement a computerized data base for reporting and tracking the scholarly productivity of faculty members.

Core competencies have been identified for all core courses in the COBA. These competencies reflect those items that faculty deem to be important knowledge bases for each student to possess as they complete their general business education. These are identified in the assessment records of COBA. The Marketing program is responsible for two core courses, MKT 350 (Principles of Marketing) and QBA 237 (Basic Business Statistics).

A definitive list of specialized marketing program objectives has been developed.

Curriculum

The Marketing Department curriculum is described in the University Catalog.

Evaluation Methods

All matriculating students are required to have a 2.0 GPA to enter the business school and must have completed a prescribed list of prerequisite courses. The specific requirements are found in the University Catalog. In addition, students must have a 2.5 GPA in all 300–500 level business classes to graduate.

On the first meeting of every course, students receive a syllabus for each course that clearly identifies the course description, objectives, instructor, meeting times & location, course policies (such as attendance, non-discrimination) and method and frequency of evaluation. The type and frequency of evaluation is determined by the course instructor as appropriate for the content and process of the course, and is based on course objectives. This may include written, oral or practical examinations, written or oral presentations or assignments, small group discussions, research papers, case-based learning, portfolios, and other activities. Students usually receive examination grades/evaluation input within one week following an exercise. Grades and/or performance in a given course or discipline may be discussed with the course instructor,

faculty advisor, or Department Head by appointment. In addition, the faculty advisor is responsible for monitoring the progress of all students.

Educational Effectiveness

As described previously under student evaluation, the Marketing Department conducts continuous and ongoing evaluation of student, faculty and course performance. This includes objective measures such as student performance on written, oral and practical examinations/assignments and student evaluation of courses and faculty. Summary evaluation includes performance on written and focused examinations near the end of each course.

A sample of department graduates are contacted regarding employment, practice setting, area of specialty (job titles), and salaries.

In addition to the Assessment Plan, a list of Marketing Major Competencies was developed by members of the Marketing faculty. Competencies were divided based on AACSB guidelines into Knowledge based, skill based and value based, to wit:

Marketing Major Competency Listing

Knowledge Based

1. Portfolio analysis
2. Product lifecycle control
3. Consumer behavior models
4. Sales management issues
5. Channel power and logistics issues
6. Pricing strategy

Skill Based

1. Marketing strategy development
2. Attack/Defense strategy
3. Regression
4. Time series

Value Based

1. Importance of doing ethical research
2. Ethical decision making

The first step in the departmental course assessment is to develop a series of questions that would address the above competencies. These questions were developed by faculty teaching the core courses. The questions were then

introduced throughout examinations administered during each semester. They were drawn out of each exam and examined in the aggregate to measure mastery of learning. If a question met a certain percentage of mastery, then it was supposed that students had been properly (quantity and quality) introduced to such topics. If a question was missed at a certain percentage of the students, then addi-

tional attention would be given to such topic material with the hope that the next semester's analysis would demonstrate satisfactory mastery of the subject.

The second and final step in the assessment process is a repeat of the "core courses assessment" for each course in the department.

Robert H. Luke
Department of Marketing
Missouri State University
901 S. National Avenue
Springfield, MO 65802
Phone: 417.836.5413
E-Mail: robinluke@smsu.edu

ADVISORY COMMITTEE ROLE IN PROGRAM AND STUDENT ASSESSMENT

Larry A. Haase, Central Missouri State University

Comprehensive assessment efforts require the participation of external evaluators to validate the efforts of traditional internal evaluators. A department or program advisory committee provides an excellent source for external evaluators. These individuals are familiar with the program and have already established their personal interest in the program by agreeing to serve on the committee. They will also be in a position to observe and evaluate the performance measures on a long term basis. The actual process by which advisory committees might participate in the assessment effort can be described as either "Active" or "Passive."

Passive

The idea of having advisory committees in academics is actually a fairly new idea in U.S. Higher education, although it has existed in selected programs for many years. In many cases, the establishment of advisory committees were the result of planning and strategies implemented in the process of seeking professional accreditation for the program.

A group of professional practitioners from various careers in Marketing would meet one or more times during the year with faculty to discuss the design and content of the major program. As the interest in "Assessment" developed the advisory committee might be asked to also review performance measures (assessment data) that were generated by the department assessment efforts. While this approach provides some external evaluation, it is limited to reviewing summative data without any opportunity for interaction with the students that created the data.

Active

After several years of experience with integrating the

assessment process and data with the advisory committees, a significant change was introduced by adding senior exit focus groups to the process and incorporating these focus group sessions into the advisory committees regularly scheduled on campus meetings. This change provides the external evaluators with in-depth information that was not available with the previous process.

An additional benefit of this active approach was the message it conveyed to the students. They recognize and appreciate that the faculty and advisory committee are directly involved and seeking this feedback from the students. Ideas and information can be communicated during these focus group sessions that would typically not have been shared through the previous process that did not utilize focus groups.

Central's Current Advisory Committee/Assessment Arrangement

Composition of Advisory Committee:

Six to ten Marketing professionals from various marketing careers. About 50% are alumni of the program. The alumni represent a span of experiences of from two to 30 years.

Meeting Schedule:

A half day meeting in late November and April on campus.

Typical Agenda:

Noon – Lunch with faculty

2:00 pm – 3:15 pm – Focus Group sessions with seniors in the capstone marketing course.

3:15 pm – 5:00 pm Advisory Committee and Marketing faculty review assessment measures and focus group responses.

Larry A. Haase
Harmon College of Business Administration
Central Missouri State University
Dockery 200-G
Warrensburg, MO 64093
Phone: 660.543.8618
FAX: 660.543.8465
E-Mail: haase@cmsu1.cmsu.edu

EXPECTATIONS FOR NEW FACULTY

Larry A. Haase, Central Missouri State University

Quality departments are composed of high energy faculty working together cooperatively to achieve the Department Goals. Department chairs strive to create such an ideal environment by effectively managing their faculty resources. In some instances, faculty positions may be classified differently and the expectations may be tailored to fit the specific needs the position was established to serve. For example, some classes may be taught by full-time professionals who are hired as part-time or adjunct faculty to connect their specific expertise with specific specialized classes. In other cases, individuals may be hired as full-time, “supporting” faculty where the expectations may be limited to only teaching related goals and these faculty have no obligations in other areas such as research or service.

New, full-time, tenure-track faculty will have expectations that are typically classified into the following three areas; teaching, research/publication and service. Ideally, the faculty and department chair will establish jointly an annual professional development plan that is reviewed and revised on an annual basis. This type of planning and assessment should continue on an annual basis throughout the faculty person’s career. In other words, all faculty regardless of their classification and tenure or promotion status should be actively involved with a professional development plan throughout their career in higher education.

The specific expectations within each of the categories referred to previously will vary depending on how the position was originally defined by the University and expectations that exist for this department due to its accreditation status. Each of the three “categories” of expectations will be reviewed in the following paragraphs.

Teaching Expectations

Teaching a specific set of classes is normally what is considered the fundamental and primary duty of a faculty member. Certainly this is how the typical lay person would describe the duties of a professor and the majority of academic institutions would consider teaching the primary activity a professor is hired for.

By its very nature, the expectations for teaching are more difficult to define, quantify and measure. Typical quanti-

ifiable variables that might be used are credit hour production, grade distributions, student evaluations and peer evaluations. The ideal annual professional development plan will identify both long-term and short-term goals for the teaching area.

Research/Publication Expectations

This area is somewhat easier to quantify than the teaching area and the level of expectations most directly defined by the accreditation status of the program and the nature of program offered. For example, if the Department is not offering any graduate degrees, the extent of publication requirements will be less involved. There must be minimum annual expectations to insure long-term productivity with publication accomplishments. The nature and extent of this annual activity may vary but there must be continuing evidence of progress.

Service Expectations

Faculty service commitments need to be carefully planned and monitored to insure that the individual’s time and talent are allocated appropriately between the teaching, research/publication and service areas. The faculty should be expected to provide some level of service both internally to the University and externally within the community and also their profession.

Within the University an individual should contribute at the department level, the college level and University-wide. There are usually significant differences between different types of committees and other assignments. For example, a faculty member serving as advisor to the student marketing club will expend more time and energy in that capacity than another individual serving on the department scholarship/awards committee.

Outside the University the faculty needs to be involved in various ways with their professional academic organizations and the business/industry sector that they are training their students to enter for a career. For academic organizations, the individual should develop a quality supportive relationship with a limited member of organizations rather than making small commitments to a larger number. The non-academic type of involvement might involve local organizations like the Ad Club or Chamber of commerce. It could also mean a close relationship with

a selective group of local employers that might provide internship or employment opportunities for graduates.

Summary

The basic concept for maintaining a “Quality” department performance is to have all members of a department working cooperatively together to achieve the department’s

goals. This can only be accomplished when all members of the department assume their fair share of the “expectations” in the three categories identified as teaching, research and service. By using annual professional development planning and assessment, a department can encourage a cooperative effort between the department faculty that will facilitate the department accomplishing its goals.

Larry A. Haase
Harmon College of Business Administration
Central Missouri State University
Dockery 200-G
Warrensburg, MO 64093
Phone: 660.543.8618
FAX: 660.543.8465
E-Mail: haase@cmsu1.cmsu.edu

ADMINISTRATION EXPECTATIONS: WHAT YOUR CHAIR AND DEAN EXPECT

JoAnn K. Linrud, Central Michigan University

The role of the associate dean in the College of Business Administration at Central Michigan University (CMU) is to manage the operations of the college, attending to daily, weekly, and monthly activities that ensure continuous and smooth operation of the college. Often the role includes trouble-shooting for the dean, acting as liaison between the dean's office and students, managing curricular issues, and taking on special projects that don't fit elsewhere. Regarding the associate dean's expectations of new faculty, the following three items would be top-of-the-list.

1. ***Pay attention to your contractual obligations and expectations.*** At CMU, these are (a) teaching competence, (b) scholarly and creative activity, (c) professional growth of a significant nature, and (d) university service. As an institution whose operations are guided by the collective bargaining between the administration and a faculty association, the contract, supplemented by department bylaws, specifies the criteria and standards relevant for accomplishment in each of the areas, toward a goal of successful promotion and tenure decisions. Probationary faculty (tenure-track but not tenured) have additional require-

ments. Inquire pre-hire about such contractual nuances to prevent future regrets.

2. ***Pay attention to the informal culture.*** As always, there will be subjective measures of a new faculty member's performance. These might include visibility at department and college meetings, following the chain of command, ability and willingness to meet students' needs beyond the classroom expectations, participation with colleagues in research and professional growth endeavors, meeting deadlines, refraining from asking the chair or dean for favors, and remembering the office professional's birthday. In short, be a good "collegiate citizen."
3. ***Be proactive in seeking mentoring, if desired or needed.*** Take first steps in seeking advice about department- or college- or university-specific practices, if you're unsure. Better to have identified a potential problem and sought solutions than to have to respond to student or chair complaints. Take advantage of university services related to pedagogical aids. This will also help you learn the university culture and could allow you to become acquainted with others outside of your college.

JoAnn K. Linrud
250 Applied Business Studies Complex
Central Michigan University
Mt. Pleasant, MI 48859
Phone: 989.774.6510
FAX: 989.774.1320
E-Mail: joann.linrud@cmich.edu

ADMINISTRATION EXPECTATIONS FOR NEW FACULTY

Jack L. Sterrett, Southeast Missouri State University

Faculty positions, for the most part, will tend to differ by type of University and accreditation status, therefore, modifying, in part, administration expectations of faculty. At the end of the day, however, administration expectations of all new as well as continuing faculty are virtually the same. Following are a few expectations (friendly suggestions; albeit, some micro in nature) for any new faculty beginning academic careers at any type of institution of higher learning. Department Chairs and Deans tend mostly to be supportive and desirous that new faculty succeed in their new positions, so it becomes important for new faculty to involve themselves in a variety of activities, including even what far too many consider to be mundane incidentals, as included in the following list of items.

Making the assumption that most Chairs and Deans have similar expectations of new faculty in the areas of **teaching, scholarship and service**, with the primary focus of new faculty becoming **teacher-scholars** and excellent **academic/collegiate citizens**, the following items are personal expectations of new faculty at a **public regional institution**. Expectations are that new faculty will:

1. Focus on quality teaching; be able to impart information in a manner which leads to student success.
2. Continually seek teacher-improvement activities; en-

gage in current teaching delivery systems and practices.

3. Establish a research agenda early on, and develop an appreciation for the research cycle.
4. Become an active player; get involved in department, college, university and professional activities; volunteer/contribute personal expertise; fulfill citizenship obligations
5. Take on the responsibility to become informed; seek information concerning the campus, college and department; become familiar with policies and procedures; become familiar with campus culture – learn the rules of the game; don't blame the system for not being aware of the basics.
6. Be available/accessible to students; establish and maintain consistent weekly office hours.
7. Seek guidance of the department chair and faculty on a routine basis; get to know other faculty.
8. Develop an early understanding that responding to e-mails and voice-mails, and submitting requested information/reports by each and every deadline, are not choices; these indeed are basic expectations.
9. Develop an attitude of becoming a problem-solver; contribute to success.
10. Become a member of the Marketing Management Association.

Jack L. Sterrett
Department of Management and Marketing
Southeast Missouri State University
Cape Girardeau, MO 63701
Phone: 573.651.2915
FAX: 573.651.2909
E-Mail: jsterrett@semo.edu

ENHANCING THE INSTRUCTIONAL EFFECTIVENESS OF MARKETING SIMULATION GAMES

Dave Hutchinson, University of Windsor
William Wellington, University of Windsor
T. Rick Whiteley, Calabash Educational Software
A.J. Faria, University of Windsor

With their introduction at the University of Washington in 1957, business simulation games have now been in use in university classes for nearly 50 years. Since that time, the number of business simulation games and their use in university business courses has grown enormously. Presently, more than 200 business simulation games are in use at over 1,700 universities and community colleges by over 11,000 business teachers in the U.S. alone (Faria 1998). In an e-mail survey to 14,497 business faculty members at American Assembly of Collegiate Schools of Business institutions, it was reported that 47.7 percent of all respondents are currently using or had used a business simulation game (Faria and Wellington 2004). Comprehensive reviews can be found in Greenlaw and Wyman (1973); Wolfe (1985); Miles, Biggs, and Schubert (1986); Randel, Morris, Wetzel, and Whitehill (1992); and Wolfe (1997) among others.

Despite the widespread use of business simulation games, an ongoing concern among many academics is whether or not participation in a simulation exercise is a meaningful learning experience. Meaningfulness, as applied to the business simulation gaming experience, has taken a number of interpretations as reflected in past research, including (a) the learning, or skills training, aspects of business games; (b) the relative merit of business simulation games versus other teaching approaches; (c) the external validity of business simulation games; and (d) the internal validity of business simulation games.

Research into the skills training or learning aspects of business simulation games dates back to the first uses of business games in university classes. Faria (2001) provides a history and complete list of references covering research on skills training through the use of business simulation games. The merit of simulation games versus other teaching approaches has been investigated by a number of researchers (Greenlaw and Wyman 1973; Hall

1987; Keys 1976; Miles et al. 1986; Randle et al. 1992; Snow 1976; Spect and Sandlin 1991; Waggener 1979; Washbush and Gosenpud 1991; Wolfe 1985, 1997). The external validity of a business game has generally been viewed as a measure of how well the business game models the real world industry in which the simulation takes place. A number of studies of this nature have supported the external validity of business games, the best of which can be found in Wolfe and Roberts (1986, 1993). The internal validity of business simulation games has been measured in two ways: (a) do better students outperform poorer students; and (b) do the decisions of participants in a simulation game, over time, conform to the environment of the simulation? The most thorough study on internal validity, which also contains an overview of all past research on this topic, can be found in Wellington and Faria (2001).

The four speakers during this panel session will cover the following topics: (a) the history and growth of marketing simulation games; (b) current usage of marketing simulation games in universities and business training programs; (c) the learning outcomes that can be expected from the use of marketing simulation games; (d) a comparison of learning from marketing simulation games versus other teaching approaches; and (e) means of enhancing the learning from marketing simulation games including a unique product-market entry strategy approach, decision protocol reporting, strategic planning with delayed feedback, student debriefing presentations, promotional campaign development and planning, and the development of complete marketing plans.

Detailed material from the simulation gaming and marketing literature will be cited and the four panel members will present experiences from their combined eighty years of experience using marketing simulation games in university classroom settings and executive seminars.

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Dave Hutchinson

Department of Marketing and Management Science
Odette School of Business
University of Windsor
Windsor, Ontario, Canada N9B 3P4
Phone: 519.253.3000, Ext. 3112
FAX: 519.973.7073
E-Mail: dhutch@uwindsor.ca

T. Rick Whiteley

Calabash Educational Software
North York, Ontario
Canada M2N 6N1
E-Mail: drtrw@calabash.ca

William Wellington

Department of Marketing and Management Science
Odette School of Business
University of Windsor
Windsor, Ontario, Canada N9B 3P4
Phone: 519.253.3000, Ext. 3151
FAX: 519.973.7073
E-Mail: r87@uwindsor.ca

A.J. Faria

Department of Marketing and Management Science
Odette School of Business
University of Windsor
Windsor, Ontario, Canada N9B 3P4
Phone: 519.253.3000, Ext. 3101
Fax: 519.973-7073
E-Mail: ad9@uwindsor.ca

SIMULATION GAMES: ENHANCING THE INSTRUCTIONAL EXPERIENCE WITH PROJECTS

David Hutchinson, University of Windsor

Business simulation games are used within many schools and the benefits from the games have been widely reported. Simulation games have also been considered for use as the back-bone for graduate programs, which indicates the potential to enhance the use of this educational tool. This presentation covers the use of a Promotional Project as an enhancement to the outcome of simulation games in marketing.

Benefits and Enhancements

Business simulation games are used in a majority of business schools in North America (Faria 1998). In a survey of business faculty in North America, 30 percent of

the respondents were current users (Faria and Wellington 2004). Simulation games have also been considered for use as the back-bone of graduate programs (Green and McQuaid 2003), exemplifying their importance of as a pedagogical tool. The experiential benefits of the simulation game are well documented in publications such as the ABSEL Conference Proceedings and *Simulation & Gaming* and a few of these benefits are summarized in Figure 1.

Enhanced Learning Outcomes

The reporting on enhanced learning strategies and tactics do not appear frequently in the above mentioned proceed-

FIGURE 1
Simulation Games: Benefits/Enhancements

Potential Learning Benefits:

- ◆ Dealing with uncertainty;
- ◆ Management role playing;
- ◆ Use business software;
- ◆ Develop decision support systems;
- ◆ “Running Cases: Gentry ‘90;
- ◆ Demonstrate business concepts:
 - ◆ reading and understanding financial statements;
 - ◆ applying basic financial tools (ratio analysis, contribution margin analysis, and cash flow projections);
 - ◆ developing forecasting methods

Learning Enhancements:

- ◆ Decision protocol reporting;
- ◆ Strategic Planning with delayed feedback;
- ◆ Debriefing presentations;
- ◆ Game Modifications;
- ◆ Market Plan Reports
- ◆ Projects: Promotional Strategy and Creative Presentation

ings and journals. As shown in Figure 1, the business simulation game can be enhanced with projects, interactive exercises, reports, presentations, and summary exercises. In the Marketing and Management Science Area within the Odette School of Business, the simulation game COMPETE (Faria, Nulsen, and Roussos 1994) has been used for over 30 years. During this time, simulation game enhancements have been a regular part of the undergraduate course curriculum. Like many marketing

simulation games, COMPETE has the potential to be used as the backbone of a course supplemented or enhanced with lectures and projects.

This conference discussion paper will review a project recently used to enhance the COMPETE simulation game. Based on in-class surveys of undergraduate students at the Odette School of Business, the simulation game appears to be a highlight of the second year marketing course.

According to the literature, projects are generally viewed as fun by students and demonstrate marketing in action. Also, projects are flexible enough to fit within a professor's goals for a course (Nicholson and Oliphant 2002).

One concern expressed by students about the marketing simulation, COMPETE, was the lack of its ability to allow input on the creativity of advertisements. In an effort to enhance the game experience and provide experience in developing a business report, the use of a Promotional Strategy project was implemented in the Winter Semester of 2005. Students were given the opportunity to develop a written report based on their company's advertising strategy explaining the rationale for a proposed creative advertising spot. In addition, students were required to present the report with an example of the creative communication piece to the class. The class evaluated and ranked the presentations. Based on the outcome of the evaluations, the team's advertising effectiveness within the game was altered accordingly.

This project enhanced the simulation game by providing an opportunity to input creativity into the game. The game enhanced the project by providing unique data and situations since the individual team's game strategies and objectives were team specific. The integration of the

simulation game with the course project appeared to be well received by the students, based on the level of enthusiasm during the presentations.

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David Hutchinson
Odette School of Business
University of Windsor
Windsor, Ontario
Canada N9B 3P4
E-Mail: dhutch@uwindsor.ca

USING LEARNING ENHANCEMENT APPROACHES WITH MARKETING SIMULATION GAMES

William J. Wellington, University of Windsor

Marketing simulation games are useful vehicles that enable marketing educators to introduce their students to interactive decision-making and experiential learning. Most simulation games are selected and employed because of their unique learning benefits and for their ability to demonstrate marketing concepts. Educators need to be aware that different learning outcomes are possible with the employment of creative learning enhancement approaches. This paper presents three such approaches: decision protocol reporting; strategic planning with delayed feedback; and student debriefing presentations.

Marketing simulation games have been mainly employed as vehicles to enable marketing educators to engage their students in interactive decision-making. They offer many unique learning benefits including: dealing with uncertainty, management role playing, group decision making, learning to use business software, and learning to develop decision support systems. Simulation games offer practical demonstrations of basic business concepts such as reading and understanding financial statements, applying basic financial tools (ratio analysis, contribution margin analysis, and cash flow projections) and developing forecasting methods. Simulations can serve as “running” cases where participants analyze a situation and come up with a decision that is then implemented resulting in outcomes that can be examined and learned from (Gentry 1990). All of these potential learning benefits derive from the basic design of these simulations. However, there are additional learning enhancement approaches that can allow marketing simulation games to be used for learning beyond their basic design and allow for developing and applying managerial skills beyond the normal game performance measures. Three learning enhancement approaches that have been used in marketing classes within the Odette School of Business at the University of Windsor are (a) decision protocol reporting, (b) strategic planning with delayed feedback, (c) and student debriefing presentations.

Decision protocol reporting involves having the simulation participants write-up their decisions and provide a detailed written explanation of the rationale behind those decisions. For example, what were their prices and how

did they set them? How did they determine their promotional budgets, etc? The instructor can then provide detailed feedback on methods or approaches to price setting, promotional budgeting, etc. The objective is to get students to think about relating marketing decision making theory and models to the simulation decision-making experience. The number of iterations of protocol reports can vary according to the complexity of the simulation and the willingness of the instructor to evaluate and provide meaningful feedback. The experience at the Odette School is that at least two protocol reports must be evaluated to get students to think deeply. However, more than four reports often leads to fatigue and repetition. In addition, protocol reports prepared early in the simulation tend to have more learning impact than ones that are prepared later in the simulation. To be effective, the instructor needs to stress that students be “honest” and report what they are really doing as opposed to what they think the instructor wants to hear. As such, “first” reports need a very liberal evaluation when students say “I guessed” while follow-ups need to be tied to the feedback provided in the “first” reports where the instructor suggests alternatives to “guessing.”

Strategic planning with delayed feedback requires the instructor to alter either of/or both the decision submission schedule and the output/feedback schedule of the simulation. For example, students can be asked to make decisions on the basis of a “lagged” feedback schedule so that they have to plan ahead. The planning can involve one or two decision periods or even as many as four periods. In many instances, the planning revolves around sales forecasting but, when students have to take into account competitive activity, it further enhances their involvement. This approach works best when students are required to develop and then present formal written strategic plans. This approach has been employed in both an MBA strategic planning course and an undergraduate marketing decision-making course. Students made four straight interactive marketing decisions to gain experience and an understanding of the simulation and competitive environment. The students were asked to undertake some very basic forecast planning and were held accountable to set and achieve sales, gross margin and earnings

objectives each period. After the four periods, decision-making was suspended for four weeks during which time the students were asked to develop a strategic marketing plan for four consecutive decisions. The plan would be carried out via the simultaneous handing in of these four consecutive decisions that would then be run through the simulation one after another with no intervening feedback. The MBA student groups were asked to make a brief presentation of their plan to the entire class. At the conclusion of the presentations by the MBA students, the groups were presented with the “results” of the decisions associated with their plans. The undergrad students simply received graded feedback on their written plans along with their decision results.

It is customary for simulation administrators to employ some form of debriefing at the conclusion of a simulation exercise to explain the process, its outcomes and to ascertain the learning impact of the exercise. Often, the “sage” administrator reports to the students how the simulation was parameterized and which strategies were best rewarded in this kind of situation. The administrator might suggest approaches or tools that could have been used to improve participant decision-making. The simulation might be discussed in terms of the learning objectives that it was designed to achieve and how well the exercise appeared to have accomplished these objectives.

The instructor may receive verbal and written feedback from the students during this process. The end of competition debriefing may be enhanced by having students present their strategies and thus generate more discussion and interest. The instructor can participate by discussing the fit of each group’s decision-making strategy with the game market-place structure. This approach also promises to interject some “fun” into the exercise as students present their plans knowing competitors will see them. As such, the presentations involve both pride and bravado. If this debriefing approach is used with a delayed feedback situation, the instructor can contribute some excitement to the proceedings by providing competition results at the end of each presentation that can then be brought into the discussion of the effectiveness of the planning efforts.

In conclusion, the use of creative approaches to enhance the learning experiences associated with marketing simulation games can be fun while serving to de-emphasize performance outcomes and concentrate on other aspects of marketing management.

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William J. Wellington
University of Windsor
Windsor, Ontario
Canada N9B 3P4
E-Mail: r87@uwindsor.ca

CONTROLLING PRODUCT-MARKET ENTRY IN MARKETING SIMULATION GAMES

T. Rick Whiteley, Calabash Educational Software

Marketing simulation games have had a long history as a pedagogical tool in business education. In the early 1960s, most games were “noncomputer” games, requiring manual calculations to obtain the results (McRaith 1962). These games, which were more commonly used than the “computer-based” games, were relatively simple in that only a few variables were considered and the formulas used in the calculations were uncomplicated; the computer-based games were just the opposite (McRaith 1962). Fast forward to the 21st century where marketing simulations games are still part of the pedagogical landscape, but, now, multi-variable computer-based games with complex response functions and mathematical models dominate.

As a learning resource, marketing simulation games provide important pedagogical benefits, but there are also some negative issues. One benefit is that students get to be active participants in an ongoing, dynamic case study, instead of just analyzing a static textbook case, thereby increasing student involvement in the ongoing learning process. A second benefit is that the active learning situation requires consideration of all levels of learning set out in Bloom’s Taxonomy of the cognitive domain (i.e., knowledge, comprehension, application, analysis, synthesis, and evaluation) (Bloom 1956).

One of the major disadvantages of playing a marketing simulation game is that it can be very overwhelming for students. The game participants not only need to learn how to play the game [i.e., by studying the game manual and by making (entering) decisions] but they also need to learn how to draw on the subject knowledge that is relevant and to carry out the analysis so that effective decisions are made. To make matters worse, the games tend to be competitive in nature for the purpose of grade assessment. In a static case situation, the competitive dimension is absent. However, marketing educators would argue that the competitive feature better prepares students for the “real world,” even though many students do not like this aspect of the games.

Another disadvantage of the way the typical game is run is that all participants are required (allowed) to produce the same products for the same markets from the very start of the game; there is no product-market differentiation across the competitive companies, or if differentiating

product-market entry strategies are allowed (e.g., as in the *Airline* game), there is no theoretical foundation providing guidance.

In order to strengthen the pedagogical value of marketing simulation games, game developers, or at least course instructors (i.e., game administrators), need to provide students with product-market entry guidelines based on specific theoretical frameworks. One such framework is the *economic structure of the competitive market*. A second appropriate theoretical foundation is the *product-market strategy framework* developed by Ansoff (1958).

Business students traditionally learn that the *economic structure of a competitive market* can reflect any one of four types of situations: *pure competition*, *oligopoly* (*duopoly*), *monopoly*, or *monopolistic competition*. Most game economic structures reflect monopolistic competition, where multiple firms are competing in the same product-markets, with each firm having a certain degree of uniqueness with respect to the nature of the other components of the marketing mix (e.g., promotion, price, specific product characteristics). In the usual game, it is unlikely that a firm would give other firms a competitive edge by abandoning a product-market in which every other firm competes. In such a situation, all of the product-markets become highly competitive. The running of the *Compete* simulation game normally allows all firms to enter any of the nine product-markets. In the *Airline* simulation game, each firm starts out with a monopoly market (route) and four markets (routes) in which it competes with one or two other airlines, but no market entry limitations are normally set for the rest of the game.

By setting limitations with respect to the economic structure of each of the product-markets, the level of competitiveness and strategic planning will increase. For example, Product A may be defined as a product that is considered to be in a *pure competition* market and Market X may be defined as a market that is only open to one firm, thereby giving the first firm to enter the market a *monopoly* in that market. By setting such constraints, the nature of some of the marketing tactics will be pre-defined. In the pure competition situation, the prices and the product characteristics for the same product across firms must be the same; thereby neutralizing these vari-

ables as competitive dimensions. It is best that the game administrator set the market price and product characteristics in order to avoid any administrative headaches. In the case of a market that has been pre-defined as a monopoly market, any firm that enters this market when there already is an operating firm would be denied entry.

The *product-market strategy framework* developed by Ansoff (1958) can serve as another theoretical foundation in a simulation game. This framework is represented by a 2 x 2 matrix, with market nature (current markets vs. new markets) and product nature (current products vs. new products) as the two overall matrix dimensions, and with market penetration, product development, market development, and diversification representing the four cells. Instead of allowing all firms to enter all product-markets from the onset of a game, the game administrator can utilize a controlled market entry approach using this framework to increase game competitiveness and the level of strategic planning. This approach can be illustrated using the *Compete* simulation game.

Compete is a three-product (SSL, CVE, TST), three-market game (Regions 1, 2, and 3), resulting in nine product-markets (3 x 3 matrix). In the first period of the game, all companies are allowed to operate in only the middle cell of the product-market matrix (i.e., C.E./Region 2). In period 2, each company can enter any, but only one, additional product-market cell. Depending on a company's decision, the firm would be engaging in product development, market development, or diversification. In period 3, each firm can enter only one additional cell, as long as it reflects product development. In period 4, each company is free to add any of the remaining six product-markets, resulting in product development, market development, or diversification, depending on the prior product-market selections. In period 5, each company is allowed to enter any of the remaining product-market cells, as long as it exits one of the currently occupied cells. In period 6, no additions or deletions are allowed. In period 7, each company can enter another product-market cell as long as such action reflects market development. No additions or deletions are allowed in period 8, the final period.

At the end of play, no company will be active in more than five of the nine cells. Depending on the decisions made, the economic structure of the game could reflect the existence of a monopoly, pure competition, monopolistic competition and/or an oligopoly. The opportunity for an exit decision in period 5 allows a company avoid facing a competitive disadvantage by correcting a past decision so that it can make a market development decision in period 7.

Establishing economic structure and market entry conditions will require students to become serious game competitors; they will have to understand the nature of the parameters set and plan accordingly. The play-of-the-game will also require adherence to appropriate theoretical foundations, rather than reflect a free-for-all exercise. The onus for reporting game-rule violations lies with the competing firms. Penalties must be assessed for such violations, as is the case for false accusations. Having to face charges for such violations or limiting decisions to prevent future market entry will place the firm in a crisis management situation. The possibility of this state of affairs, along with the underlying theoretical foundations of the game, should increase the pedagogical value of simulation-game participation.

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T. Rick Whiteley
Calabash Educational Software
North York, ON
M2N 6N1, Canada
E-Mail: drtrw@calabash.ca

CONTEXTUAL ISSUES IN TEACHING ETHICS

Lori L. Lohman, Augsburg College

ABSTRACT

Introduction

In the wake of Enron, WorldCom, and other business scandals, marketing instructors have had plenty of fodder for teaching ethical behavior in the workplace; likewise, academicians have been quick to produce scholarship on this topic. Limited attention has been paid, however, to the subject of how contextual issues affect how marketing professors teach ethics. Such factors may include teaching philosophies, religious affiliation of colleges, type of students, personal beliefs and professional background of instructors, and the influence of outside agencies like AACSB and AMA.

Religious Affiliation of College

The denominational affiliation of a college may affect ethics instruction in several ways. Historically, some denominations have been quicker to embrace teaching business, either because they view it as a “calling” (Novak, 1996) or because their financial situation was/is not strong (Lohman, 1995). Colleges affiliated with these denominations will view business itself as a worthwhile pursuit, whereas other denominations may consider it too worldly or vocational (or perhaps unethical) in nature. To the extent that business is considered a “calling” by the denomination, students would be expected to pursue their calling in an ethical manner. What constitutes “ethical” or “moral”, however, may vary by religion. Developing a marketing program for Planned Parenthood, for example, would not be acceptable at certain colleges.

Personal Beliefs and Professional Background of Instructors

Based on his interpretation of Kohlberg’s stages of moral reasoning, Murphy (1993) suggested that a personal belief structure about ethics is created over a lifetime and thus is probably more fluid than static. He wrote, “Some critics believe no real distinction can be drawn between business ethics and personal ethics” (p. 187). If this is the case, then other influences (such as a college’s religious affiliation) may gradually change how marketing instructors feel about ethical issues. One important influence would be the instructor’s professional background. What is considered ethical within one industry may be un-

acceptable in another. A specific example is Saturday morning advertising targeted to young children. An instructor who had worked at General Mills may see nothing wrong with this, while an instructor who had worked at Parenting magazine might see the issue differently. Likewise, the instructor may have experienced a clash between his or her personal beliefs (testing substances on animals is wrong) and the demands of the job (working for Pfizer).

Teaching Philosophy

Some instructors may believe that ethics cannot be taught, that students will behave based solely on their own moral compass. Those who believe it can be taught face other issues: How do they measure success in teaching about ethics; what guidelines should be used? Should ethics instruction be integrated throughout the curriculum, be taught in a stand-alone class, or both? Do case examples work, or should students be given specific moral guidelines? Answers to these questions may be dictated by any or all of the variables discussed in this paper.

Type of Students

The type of student the instructor is teaching may also influence the approach that the instructor uses to teach ethics. Bremmer, Achenreiner and Eide (2005) suggest that undergraduate students may require a different approach than graduate students, and that cultural, regional and religious influences may need to be considered.

Pressure from Outside Agencies

The American Assembly of Collegiate Schools of Business (AACSB) and the American Marketing Association (AMA) are two agencies that may influence what instructors teach about ethics. The AMA, in particular, has their own code of ethics that instructors can refer to. Such a code, however, cannot delineate all of the ethical dilemmas that students might face.

Conclusion

Without being able to see into the future, no one can predict what type of ethical dilemmas students will run across in the business world. Many academicians have conducted studies on ethics instruction, only to produce inconclusive evidence of what works and what doesn’t. It

might be wise for researchers to approach this question from another angle, one that focuses on variables facing the instructors themselves.

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Lori L. Lohman
Department of Business Administration
Augsburg College
2211 Riverside Avenue
Minneapolis, MN 55454
Phone: 612.330.1220
E-Mail: lohman@augsborg.edu

TEACHING THE RIGHT THINGS

Frederick B. Hoyt, Illinois Wesleyan University

Because I teach at a liberal arts college, where we teach businesses in a “liberal arts way” (whatever that means), I feel it is especially important to introduce an ethical perspective in every class. As a marketer, as well, I’m sensitive to charges that we’re responsible for most of the ills of business, or at least those that are peculiar neither to accountants nor lawyers.

Perhaps my most outrageous effort to introduce the topic occurred when I taught the basic marketing class. I decided that having a set of readings that were labeled “ethics” sent the wrong message; that is, I thought students would see the topic as something apart, rather than a set of challenges interwoven with every topic in marketing. Hence, I had readings on ethics under “market research” (can you trust sponsored research?), “products,”

(should marketers give customers what they want, even if what they want is harmful?), “pricing,” (ripping CDS gets into some interesting questions), and so forth.

When I had an internship with an advertising agency, I showed my readings to an MBA from the University of Chicago. His comment: “I’m surprised you had so much on ethics.” My response: “I’m dismayed I had so much from which to choose.”

Though my responsibilities no longer include the basic marketing class, my concern with introducing students to the challenges of being moral in an immoral world remains; if they don’t get it from us, they’re likely to hear about business from less objective faculty in less friendly departments in the university.

Fred B. Hoyt
Business Administration
Illinois Wesleyan University
P. O. Box 2900
Bloomington, IL 61702
Phone: 309.556.3179
FAX: 309.556.3179
E-Mail: fhoyt@iwu.edu

MODELING THE IMPACT OF ALUMNI SATISFACTION ON STUDENT ENROLMENT: AN EXPLORATORY ANALYSIS

*Adee Athiyaman, James Cook University, Australia
Paul C. Thistlethwaite, Research Design Dynamics*

The main objective of this paper is to assess the impact of alumni satisfaction on university enrolments. We contend that satisfaction will result in word-of-mouth communications about the university, which in turn will affect enrolments. To be specific, consider a university graduate associating his university education (stimulus) with him not being able to perform his job up to the satisfaction of his employer. According to Guthrie's (1950) "principle of association," the graduate, will conjure up the university experience, and because of the inability to perform his job adequately, the original tendency to recommend the university to other potential students is displaced by other tendencies such as advising students not to enroll in the university.

We posit a simple mathematical model to explain the linkage between satisfaction and enrolments. Specifically, we model the net change to student Visa applications to the U.S. during the time interval δt as:

$$\delta(VS_i) = (S_i - S_j) (r) \delta t$$

where,

V = Number of potential students at time "t"
 S_1 = Image of U.S. in the origin / source country at time "t-1" in relation to other Countries in the consideration set
 S_i = Image of U.S. at time "t"
 r = Per unit change in number of potential applicants during time "t" from time "t-1" given one unit change in image score

Dividing by δ_i and letting $\delta_i \rightarrow 0$, we obtain the differential equation:

$$dSI/dt = [(si - sl)r] / v$$

If we solve this linear first order differential equation with integrating factor $e^{t/v} = e^{rt/v}$, we obtain the expression:

$$d/dt (e^{rt/v} SI) = e^{rt/v} Si r/v$$

Integrating both sides and evaluating $t = 0$ and t gives

$$e^{rt/v} SI(t) - SI(0) = \int e^{rt/v} Si r/v dt$$

or

$$SI(t) = e^{-rt/v} SI(0) + e^{-rt/v} (r/v) \int e^{rt/v} Si dt$$

Using this equation, we can determine the effect of various satisfaction or image scores on enrolments. For instance, if satisfaction reduces to "0," then

$$t = \tau \log [SI(0)/(sl(t))]$$

where $\tau = v/r$

Data from the National Center for Education Statistics were used to estimate the above model and to assess the "time" impact of (dis)satisfaction on enrolment.

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Adee Athiyaman
 School of Business
 James Cook University
 Townsville, QLD 4811
 Australia
 Phone: +61.7.4781.5690 ♦ FAX: +61.7.4781.6533
 E-Mail: Adee.Athiyaman@jcu.edu.au

Paul C. Thistlethwaite
 Research Design Dynamics
 1185 Stacy Lane
 Macomb, IL 61455
 Phone: 309.837.4367
 E-Mail: thistle@macomb.com

ALUMNI SATISFACTION WITH A MARKETING PROGRAM

Adee Athiyaman, James Cook University, Australia
Paul C. Thistlethwaite, Research Design Dynamics

Research in marketing demonstrates the importance of consumer satisfaction to brand equity or brand attractiveness to the target market (Best 2005). Put simply, a satisfied student is expected to talk positively about the university, and these word of mouth recommendations, in turn, are expected to elicit desired responses from the target market or potential students. Recognising the importance of student satisfaction to brand equity, almost all higher education institutions in industrialised nations assess student satisfaction with their core and support services (Athiyaman 2004). However, the students do not necessarily know what is important while they are still students, so that student satisfaction surveys taken in school may not be practically valid.

The main objective of this paper is to assess students' satisfaction with skill development during study. The focus is on the question, "How could we assess graduate satisfaction with educational outcomes?"

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Adee Athiyaman
School of Business
James Cook University
Townsville, QLD 4811
Australia
Phone: +61.7.4781.5690
FAX: +61.7.4781.6533
E-Mail: Adee.Athiyaman@jcu.edu.au

Paul C. Thistlethwaite
Research Design Dynamics
1185 Stacy Lane
Macomb, IL 61455
Phone: 309.837.4367
E-Mail: thistle@macomb.com

IMPLEMENTING A MARKETING PROFESSIONALISM COURSE: WHERE DO WE GO FROM HERE?

Nancy D. Marlow, Eastern Illinois University

Tom Costello, Eastern Illinois University

Mike Boorum, Eastern Illinois University

Jane Wayland, Eastern Illinois University

As a result of assessment results, the marketing faculty at Eastern Illinois University developed and implemented a course to better prepare students for the marketing profession. This course is to be the introductory course to the marketing major, and its purpose is to acquaint the student with the expectations of the business world for the professional marketer as well as to serve as a review for important marketing concepts and terms. (See the September 2003 Proceedings of the Marketing Management Association Educators' Conference for more information on the development of this course.)

The course was first offered as an elective in Spring 2004 as a one-hour pass/fail course; it will become a required course for all marketing majors as of Spring 2007. Five members of the marketing faculty team taught the course; in addition, several guest lecturers were utilized. The main topics in the course included resume writing, interviewing techniques, the objectives for the marketing major, effective oral presentations, using the library, working on teams, case analysis, the American Marketing Association, report writing, values and ethics, and basic marketing mathematics. The activities included a written resume, a written case and presentation, group work, a written business report, and short reports from speaker meetings.

Upon the completion of the semester, students enrolled in the course were invited to assess the course. Two methods were used. The first was a short assessment survey. Students rated the topics and activities covered during the semester, using a five-point scale anchored with 1 as "not very useful" and 5 as "very useful." In addition students were asked to list the things they liked about the class as well as suggestions for improving the class.

The second method was a focus group conducted by a graduate assistant. The focus group covered the same basic outline as the written survey, but students had the

opportunity to expound further on their comments and suggestions.

The written assessment indicated that most of the students found the information on resume writing and interviewing very useful. The other topics fell into the neutral range. In addition most of the students rated the resume-writing assignment as very useful. The other assignments, with the exception of the speaker reports, fell into the neutral range. Most of the students indicated that they did not find writing the speaker reports to be useful.

The students wrote in a variety of comments. The things most often mentioned as "likes" included the resume-writing, interviewing skills, making oral presentations, the variety of professors (team teaching), the library resource day, the comfort level of the class, and meeting weekly for only one hour. The most common recommendations were to give more reminders of due dates, talk more about marketing careers, to offer more feedback on their work, and to offer the class to underclassmen.

The comments from the focus group session reinforced the findings from the written assessment; however, there were some additional comments:

- ◆ The team-building exercise was beneficial.
- ◆ The class should focus on careers and strategies to find those careers.
- ◆ Offer on-line quizzes to help with information retention.
- ◆ The instruction on ethics was insightful and provided guidance on actions to follow in certain situations.
- ◆ Although they recognized the benefit of case analyses and team projects, they would prefer having such projects due earlier in the semester – so that all projects are not due at the same time during the semester.

Perhaps the most interesting student comment was “we understand what professional dress is, but it could be helpful for younger students.” Although firm in their belief that they understand professional dress, the evidence (what they actually chose to wear for a professional presentation) belied that assertion.

The students’ comments and the marketing faculty’s assessment of the course’s implementation have reinforced the belief in the value of this course. However, the consensus has been that one hour is not sufficient. Currently, we are revising the course to a three-hour required marketing management course. The course prerequisite will be Principles of Marketing and the course will serve as an intermediate course that builds on the knowledge students gain from principles of marketing. Its purpose will be to prepare students to make operational decisions within the four elements of the marketing mix as well as to develop their abilities to find and organize information used for marketing decision making. Finally, it will introduce the format of a comprehensive marketing strategy and prepare students for the advanced integrative course in marketing strategies. It is interesting to note that during the past five years three different individuals have taught the marketing strategies course; all three individuals have

noted the need for an intermediate level course in marketing.

The revised course will include many of the topics covered in the original course, such as a review of marketing concepts and terms, values and ethics in the marketing profession, library resources for marketing, expectations for effective oral presentations, and working on teams. Additional course material includes an overview of the marketing planning process. Written assignments will require students to explain and defend tactical decisions on product, place, promotion, and price. Students will also research and explain a company’s current marketing strategy and make recommendations on an alternative strategy using a comprehensive marketing plan format.

The marketing faculty believe that these changes will enrich the marketing major. Along with the changes in this course include integration within the rest of the marketing curriculum. Students will be given a marketing plan template in principles of marketing that they will continue to “fill in” throughout the rest of their program. Hopefully, these types of activities will better prepare our majors as they progress through the program and as they enter the work force.

Nancy D. Marlow
School of Business
Eastern Illinois University
600 Lincoln
Charleston, IL 61920
Phone: 217.581.6381
FAX: 217.581.6247
E-Mail: cfndm@eiu.edu

Tom Costello
School of Business
Eastern Illinois University
600 Lincoln
Charleston, IL 61920
Phone: 217.581.6922
E-Mail: cftgc@eiu.edu

Mike Boorum
School of Business
Eastern Illinois University
600 Lincoln
Charleston, IL 61920
Phone: 217.581.2627
E-Mail: cfmlb2@eiu.edu

Jane Wayland
School of Business
Eastern Illinois University
600 Lincoln
Charleston, IL 61920
Phone: 217.581.6926
E-Mail: cfjpw@eiu.edu

REFEREED MANUSCRIPTS

THE CASE DISCUSSION GUIDE: AN ALTERNATIVE APPROACH TO CASE ANALYSIS

Karl Kampschroeder, St. Mary's University

ABSTRACT

The author reviews the justifications for using the case method as an experiential learning tool and the problems of superficial analyses, static problem conditions, over-emphasis on format, and lack of creativity in case analysis. An alternate approach using student-developed discussion guides as a tool for developing in-class analyses is then described and its use is discussed. The suggested format for a student-written Case Discussion Guide is appended.

BACKGROUND

Case analysis is a long-established pedagogic tool whose practice and use is both well-defined and widely accepted in business education. Pioneered at the Harvard School of Business in the 1920's, the case method presents students with a business situation in which they are expected to analyze the situation, define the business problem, develop alternative courses of action to "solve" the problem, and formulate, or at least suggest, a means to implement the recommended solution. This paper examines some of the problems with use of the case method and the typical structure of a formal case analysis, and suggests an alternative approach to case analysis. It then presents an alternative structure for a case analysis and discusses the authors experience with the use of the described format.

Raelin (1995) characterizes management education as following two primary models of teaching and learning. The professional education model tends to emphasize learning via text and theory whereas an action learning model emphasizes learning by doing. Case analysis combines aspects of both models into experiential learning in which theory is both learned and applied through analysis of a structured situation. Because students directly experience "real-world" business problems via the case, experiential learning using the case method is considered to have a number of advantages over text and lecture based learning. Students are more likely to internalize and retain the learning because it is based in real situations; the learning process is more learner-driven rather than teacher-

driven; and, as a result, case-based learning is more personal (Bonoma and Kosnik 1989). Additionally, cases are held to better develop student's critical thinking skills (Crittenden, Crittenden, and Hawes 1999) and, through presentations of case analyses, their skills in written and oral communication (Harrison-Walker 2000).

However, these significant advantages of the case method are not easily obtained. From the instructor's viewpoint, case teaching is demanding as instructors must "choreograph" or lead, moderate, and guide in-class case discussions without prescribing solutions (Rangan 1995; Kerin 1991). Case teaching places significant burdens on time for both preparation and grading (Lunsford 1990). Additionally, the typical 50–80 minute time limit of undergraduate classes may significantly attenuate the depth and breadth of in-class case discussions. While these aspects of using the case method may be regarded as problems of instruction planning, there are also four main pedagogical criticisms of the case method.

Many instructors will likely agree with McCarthy's (1962) observation made over 40 years ago: "In other words, in the normal unstructured case analysis, many students are just guessing. Similar, but less extensive, treatment of a few other cases has led to similarly discouraging results. *Average students give superficial analyses, and may completely miss the underlying difficulties* of which the current problem is only a symptom." [italics added] Second, cases have been criticized as presenting students with business problems that are static, and therefore unreal, while actual business situations are always dynamic and fluid (Stonham 1995). Third, while one aim of the case method is to give students practice in defining and structuring their analysis of a problem, most major case texts prescribe a case analysis format (Kerin and Peterson 2004; Rosenthal and Brown 2000; Vincze and Anderson 2000). While a format guide may be useful, Lunsford (1990) points out that students frequently assume that following the format is essential to achieving a high grade on a case analysis, robbing the method (and thereby the students) of some degree of creativity in analyzing the case problem. Fourth, the common use of SWOT analysis

as a component of case analysis, Armstrong (2001) argues, blurs the distinction between evaluation and idea generation, reducing the creativity of possible solutions students derive from their analysis.

From the experience of using cases as teaching tools in both undergraduate and MBA classes, I would add two other problems to the foregoing list of criticisms of the case method. First, the emphasis on communication skills, in the form of oral and written presentations, inherently biases an instructor's evaluation in favor of students who are more articulate and skilled at writing. It can be argued that this is as it should be as we prepare students for a workplace in which communication skills are consistently ranked, by employers, as important. However, in schools with significant numbers of international students or students with limited English proficiency, emphasis almost inevitably skews rewards (i.e., grades) in favor of native English speakers who write well.

A second problem is, to phrase it metaphorically, that the case method is cross-sectional while managerial decision-making is longitudinal. This is inevitable so long as cases analyses are expected to lead to a solution of the problem(s) portrayed in the case scenario. However, as Dickson (1997) points out, understanding decision-making routines are essential to improving the quality of management. The development of alternative courses of action in written case analyses does encourage students to create a range of choices to choose from, but does not really force them to confront the process of how the final choice is made. Too often they develop a set of recommendations and move towards a conclusion while reading the case for the first time (McCarthy 1962) and do not critically examine how their preferred choice is made.

In response to these criticisms of the case method and from participation in case workshops sponsored by the Management Education Alliance, the author has developed an alternative approach to the use of analysis in the classroom. This approach, the Case Discussion Guide, emphasizes critical analysis of the case material, linkages between theory, concepts, and applied decisions, and preparation for participation in a class discussion that may – or may not – lead to a joint decision on a single recommended solution. In the case discussion guide method, students individually (or in pairs in larger classes) prepare a case discussion guide to use as the basis for their participation in the in-class discussion. Appendix 1 is a memo that would be distributed to the students at the beginning of the course, when cases to be analyzed are assigned. The memo outlines the format and purpose of the Case Discussion Guide that students will create. Students are informed that the discussion guide they prepare is to be used for two purposes: (1) to guide their

participation in the discussion, and (2) to serve as a written record of their work on the case. From reading the memo and its six major questions, a number of differences between this approach and the typical structure of a case analysis become apparent.

First, students are not expected to write a complete exposition of the case, they are expected to focus, as managers often do, on the critical facts that are relevant to the situation. This reduces the problem of students getting sidetracked into skillfully, but superficially, re-stating the case material. An initial portion of the class discussion of the case, then, deals with enumerating the important facts of the case. Different students may argue the relative importance of different facts. Two or three different priority orderings of the critical facts may emerge from this portion of the discussion. This can help to point out how what a manager judges to be important can influence the range of possible decisions available for consideration or the choice of a specific decision.

Second, students are explicitly challenged to critically examine what are facts supported by data and what are the facts supported by a reasonable interpretation of the case material. Cases often contain statements that may be quite reasonable but that are not supported by data. By confronting this difference in the discussion, students can become more aware of the uncertainty inherent in managerial decision-making.

Third, students are required to link the implicit assumptions, which often undergird their proposed solutions, to marketing concepts or theory. For example, recommending a certain type of promotional campaign for a product or service should be supported by a discussion of why and how promotion affects behavior of the target buyer. The discussion, then, can lead students from simple tactical approaches, to (ideally) tactical approaches linked to strategy and theory.

In the author's experience, using the case discussion guide as the basis for class discussion has seemed to sift the focus of student participation from re-telling the case material and demonstrating how a particular students' or groups' proposed solution was best to more collaboration in exploring the case material. This should not suggest that a single solution to the case problem emerges by the end of the discussion. Instead, with the instructor serving as moderator and guide, rather than expert leader, students can see how different approaches to a problem evolve out of evaluation of the facts of the case and application of conceptual knowledge. Moreover, they can gain practice in exploring and questioning easy assumptions that may lead to flawed decision-making.

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APPENDIX 1

BA6385
Summer 1, 2005
Dr. Kampschroeder

Case Discussion Guides and Case Analyses

Purpose and Work Product

The purpose of this memo is to explain how we will be using cases in this course, how to analyze a case, and the work products that you are expected to deliver

The purpose of case analysis (regardless of how the written work is structured) is to (A) build your skills in extracting the critical information in a business situation, and (B) applying the concepts of marketing management to evaluating the facts and possible decisions a manager faces in the case, and (C) developing a clear, concise solution to the problem in the case.

Note: Recommending that further research be done to solve the case is usually not a decision.

Format and Content

Your work product for the cases is to be a written case discussion guide. The case discussion guide should focus on the major points of the case and serve as a guide for your participation in the class discussion of the case. The discussion guide should be not more than five pages long (any spreadsheets used to analyze data in the case will not be counted towards the 5-page limit) and should answer the following key questions:

1. What is the central problem in this case? Note that it may be easier to state the central problem after you have given a short review of the general situation.
2. What are the critical facts of the situation in the case that we are sure we know? Critical facts are those facts which must be taken into account by any recommended course of action. You may have to analyze data in the case to extract

some critical information such as market share, profit margins, or trends in performance.

3. What are the “facts” that we think we know, based on our interpretation of the case material or on statements in the case? These “facts” may seem true, but if they are not supported by data, we can’t always be sure of them. How do these things influence our assessment of the situation?
4. What are reasonable assumptions [based on the case and what we know about how marketing works] we can make that will influence our decision? What is the concept or theory that leads us to make these assumptions?
5. What is the recommend decision? Here you may wish to outline several alternatives and then select one.
6. Why is this decision the appropriate one?

In the written work, the first five questions can be answered with short sentences or paragraphs. In some instances, a bulleted list may summarize several items. Note that you may need to show how you have used the case numbers to extract facts from the case material or to support your assumption. Sometimes, laying the numbers out in spreadsheet form [Excel] will help you to work through the quantitative aspects of the case. If you need to attach a spreadsheet showing analysis of data, do so.

General Guidelines

When analyzing a case – whether you are going to produce a discussion guide or a formal analysis – you should:

1. Read the case through and get a “feel” for the general situation. Don’t mark/highlight anything;
2. Read the case again and try to pick out the key facts and critical information. Think about what these tell you about the situation or the problem? *Discriminate between critical information and what is general background information.* For example, if you were doing a case about marketing Ford trucks it might be interesting to note that they’ve been making trucks longer than anyone. But it is more critical to the case to know the changes in market share projected after Toyota begins manufacturing large pick-ups in the U.S. Information such as this (trends in market share) may not be laid out for you in the case. You may have to extract it by analysis and interpretation.
3. Analyze and interpret the information in the case – both the narrative information and the data in charts and tables. In marketing research we say that we collect data, organize it to create information, and then interpret the information to create knowledge. In case analysis you are often given data, it may even be organized into information [tables and charts] – *but you may need to reorganize it to create new information.* Good analysis then interprets the information to create knowledge that is used to shape a proposed action or strategy. Simply re-phrasing the information in the case or paraphrasing statements from the case is not analysis – it’s summarizing. Good analysis answers the question, “What does this information mean?”
4. Organize what you are going to say. Lead into your decision – build a logical progression into the conclusion you have reached. And once you have finished, avoid the temptation to tack on a concluding cliché or bromide.

Karl Kampschroeder
School of Business Administration
St. Mary’s University
One Camino Santa Maria
San Antonio, TX 78228
Phone: 210.431.2042
FAX: 210.431.2115
E-Mail: kkampschroeder@stmarytx.edu

EFFECTS OF TEST PAPER COLOR ON STUDENT EXAM PERFORMANCE: DOES IT MAKE A DIFFERENCE?

Musa Pinar, Valparaiso University
Chris Fogliasso, Pittsburg State University

ABSTRACT

This paper examines the effect of test color on the exam performance of college students. Students in three different undergraduate business classes and one MBA class were subjects in the study. In a total of 17 different tests, students in a class were divided into two groups. Each group was given the same test, but in a different color. Test scores from the two groups were then compared. A variety of colors were used, with blue being the control color. Based on various levels of aggregations, the investigators determined that test colors that were examined made no significant difference on these students' test scores.

BACKGROUND

Color affects people in a variety of ways. Literature suggests that color has psychological affects, and it can also significantly affect physiological responses. These responses include pulse rate, reaction speed, the respiratory system, and eye fatigue (Baughan-Young 2001). Numerous studies have examined the effect of color in a variety of areas. These include an exploration of the effect of color on response rates in mail surveys (Greer and Lohtia 1994), on visual displays (Christ 1975), and on alphanumeric displays (Robertson 1980). Studies have also explored its effect on graphical/tabular data presentations (Hoadley 1990), on information retention (Gremillion and Jenkins 1981), and on information acquisition and retrieval (Lamberski and Dwyer 1983). Shacklett et al. (2005) studied the effect of colored paper on the effectiveness and efficiency of students who are taking tests. That study concluded that the color of the test which was administered made no significant difference on student scores. The current study seeks to replicate the Shacklett (2005) study with regard to color's influence on the effectiveness of students who are taking tests of different colors.

Tests are an integral part of the traditional classroom environment. As long as there have been classes, there have been tests. Teachers are challenged to ensure that

tests are taken in a secure environment that hopefully eliminates (or at least minimizes) the opportunities for cheating. One method which teachers have often utilized is to make two different versions of a test. Each version has the same questions, scrambled into a different order, and the two versions are usually copied on different paper colors. Alternating colors of the test are distributed to students in the class. However, one of the concerns of this practice is that whether or not students have an "unfair" advantages or disadvantages resulting from the color of their test.

Shacklett et al. (2004) conducted a study in which they examined whether or not the color of the test had any effect on student performance. Results of that study concluded that test color had no significant effect on student performance. The current study was conducted in order to determine if similar results would be obtained at these authors' university. The similar results from this study would further assure that the test color should not be of concern for student performance.

METHODOLOGY

In order to accomplish the study objectives, four different classes were selected during the fall of 2004 at the authors' university. Three of them were undergraduate business classes (basic marketing, two sections of legal and social environment of Business) and one MBA class (marketing strategy). Throughout the semester, students were given several exams in each of these classes. Each exam utilized variety of colored papers, with blue being constant as a control color that was constant in all exams. Students in these classes were divided into two groups. Each group was given the same test, but in a different color. That is, one group was given the test that was always printed on a blue paper, and other group was given the same test that was printed on different colored papers. In each class, these two different colored tests were given to students randomly, where students could receive different colored tests during each exam. Since the two groups of students in each class were randomly given the same test, test

scores from two groups in each exam were compared to determine if the test color had any significant impact on student test performance in these classes. This made it possible to investigate the impact of the color of test paper on student performance in multiple settings.

Table 1 presents the distributions of the exam colors by different classes. During the semester, there were four exams given in basic marketing class, five exams in each of two legal and social environment classes, and three exams in MBA marketing strategy class, which resulted in a total of 17 exams. All these multiple exams produced a total of 543 tests in all colors, where 271 were in blue color (a control color), 88 were in yellow, 50 were in green, 13 were in pink, and 121 were in white. In order to make the test scores comparable for all exams, the test scores were standardized by dividing test scores in each class by the highest score in that class. Using these standardized test scores, various comparisons of test scores were conducted for each exam and for each class, as well as for all classes combined to investigate if the color of the test had any impact on student performance. The results will be presented in the following sections.

RESULTS

Initially, a simple t-test was conducted for each exam in each class to ascertain whether or not students with blue tests (a control color) scored significantly differently than students with any other colored tests. The results of all tests are presented in Table 2. The mean comparisons of blue tests versus other colored tests showed that there were no statically significant differences between the mean scores from blue tests and the mean scores from all other colored tests (p-significant values are not reported in Table 2). Also, the mean test scores for the test colors in each class did follow any consistent pattern; rather, the means of test colors seem to change randomly. These mean comparison results for individual tests indicated that the color of the test did not have any noticeable impact

on student test performance. Specifically, students who are taking the test with certain colored did not appear to have any “unfair” advantage or disadvantages in any of the exams and/or classes.

Next analysis was done at each class level by combining the exams in the respective classes. Since there were several exams with different colored tests, it was possible to compare the blue (control) test scores against other color test score, as well as to compare scores from different colors against each other. Figure 1 presents the mean comparison results for legal and social environment 1 where blue and white were the only two colors that were used. The mean scores for blue and white color test are not significantly different ($p = .960$), in fact, they are almost identical. This indicates that did not have any effect on student test performance.

The mean comparisons for legal and social environment 2 are presented in Figure 2. In this class, five different color tests were used. The results of ANOVA show that there are significant differences among the means of different test colors ($F = 8.465, p < .01$). This suggests that the test color might have had an effect student test performance in this class. It appears that students with white color did the best (mean of 88.39), followed by green color (mean of 83.18), then blue color (mean of 78.60) and worst with yellow color (mean of 73.95). The multiple mean comparisons based on combined exam scores show that there are significant differences between mean test score for blue and yellow color (1–2, $p < .05$), blue and white (1–5, $p < .01$), yellow and green (2–3, $p < .05$), and yellow and white (2–5, $p < .01$).

The differences in mean scores for different color tests in Figure 3 for basic marketing class indicate that color of the test might have had an impact on student performance, where students with the pick color test performed the best (mean score of 79.07) and students with green color test performed the worst (mean of 66.93). However, ANOVA

TABLE 1
Distribution of the Exam Colors by Classes

	1. Blue		2. Yellow		3. Green		4. Pink		5. White		Total	
	n	Percent	n	Percent	n	Percent	n	Percent	n	Percent	n	Percent
Business Law 1	68	25.1	0	0.0	0	0.0	0	0.0	73	60.3	141	26.0
Business Law 2	94	34.7	55	62.5	17	34.0	0	0.0	18	14.9	143	33.9
Basic Marketing	50	18.5	14	15.9	14	28.0	13	100.0	12	9.9	103	19.0
Marketing Strategy	59	21.8	19	21.6	19	38.0	0	0.0	18	14.9	115	21.2
Total	271	100.0	88	100.0	50	100.0	13	100.0	121	100.0	543	100.0

TABLE 2
Comparisons of Test Color Impact on Student Performance

Legal and Social Environment 1									
Exam 1		Exam 2		Exam 3		Exam 4		Exam 5	
Blue	White	Blue	White	Blue	White	Blue	White	Blue	White
69.4	70.6	80.1	78.5	69.4	70.2	75.4	77.5	82.9	82.5
Legal and Social Environment 2									
Exam 1		Exam 2		Exam 3		Exam 4		Exam 5	
Blue	Yellow	Blue	Yellow	Blue	Yellow	Blue	White	Blue	Green
75.2	71.8	75.4	77.3	75.2	72.3	85.6	88.4	82.3	83.2
Basic Marketing									
Exam 1		Exam 2		Exam 3		Exam 4			
Blue	Yellow	Blue	Green	Blue	Pink	Blue	White		
78.2	70.4	72.8	66.9	82.0	79.1	73.6	75.8		
Marketing Strategy									
Exam 1		Exam 2		Exam 3					
Blue	Green	Blue	Yellow	Blue	White				
78.7	78.5	76.7	80.8	78.4	82.3				

FIGURE 1
Mean Comparisons of Test Colors for Legal & Social Environment 1

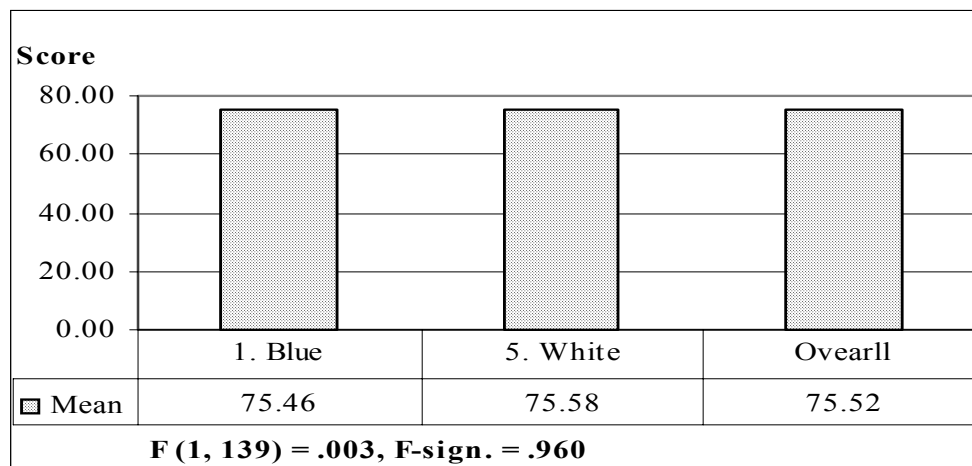


FIGURE 2
Mean Comparisons of Test Colors for Legal & Social Environment 2

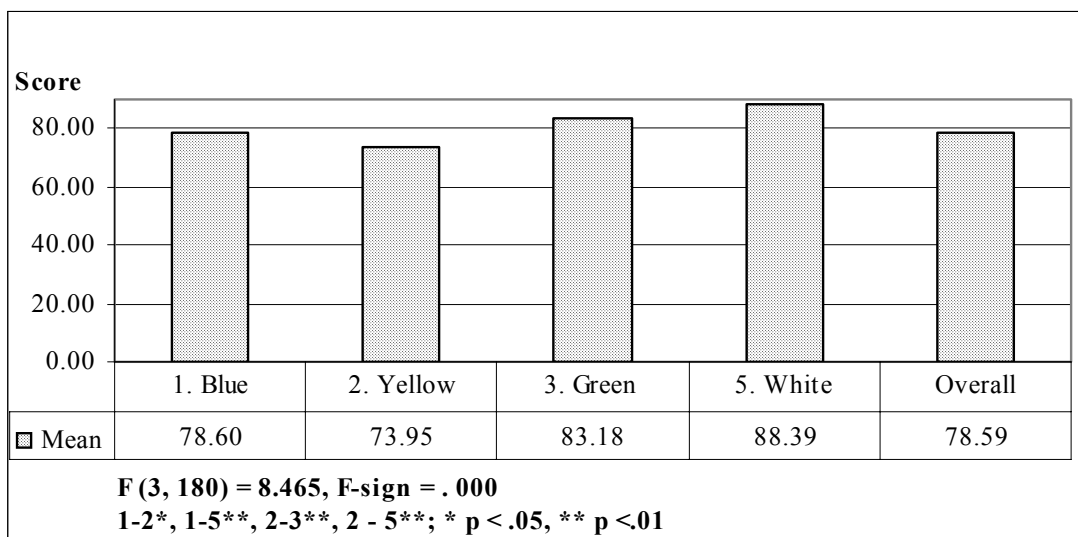
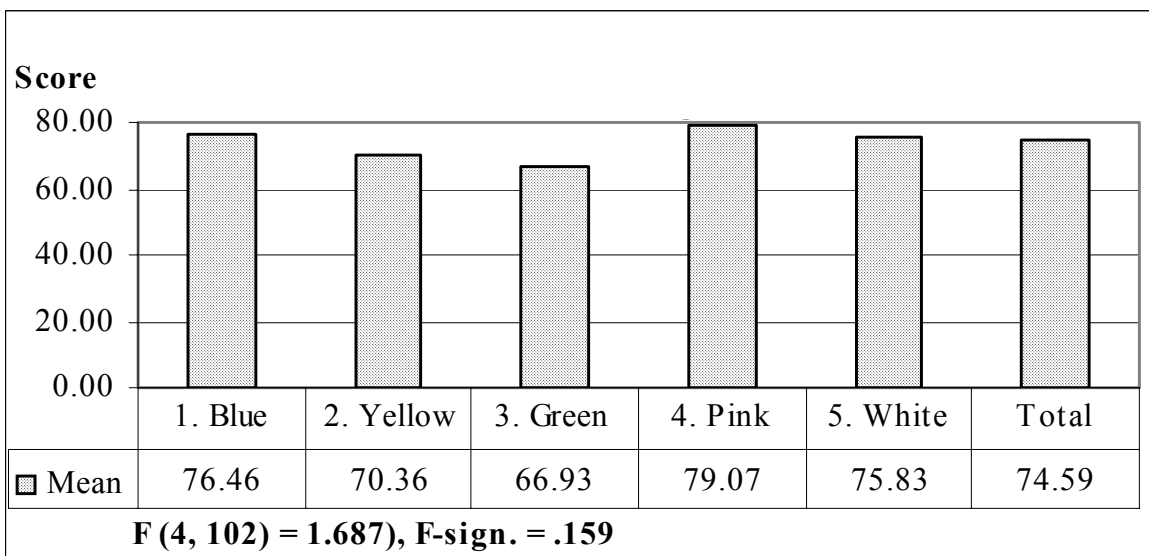


FIGURE 3
Mean Comparisons of Test Colors for Basic Marketing



results suggest that the means for different color tests were not statically significant ($F = 4.102, p = .159$). This suggests that the color of tests did not have any significant effect on student exam performance and students in basic marketing class did not seem to gain any “unfair” advantage resulting from color of their tests. Similarly, the results of ANOVA for MBA marketing strategy class in Figure 4 class show that students with white color tests

had the highest mean score and with blue tests had the lowest mean score. However, the mean comparisons indicate the test colors did not have any significant effect on student exam performance ($F = .968, p = .411$). Again, students in this class did not have any “unfair” advantage or disadvantages because of their test color. Finally, the mean comparisons of test colors were done by combining exams in all four classes. The ANOVA results show no

FIGURE 4
Mean Comparisons of Test Colors for MBA Marketing Strategy

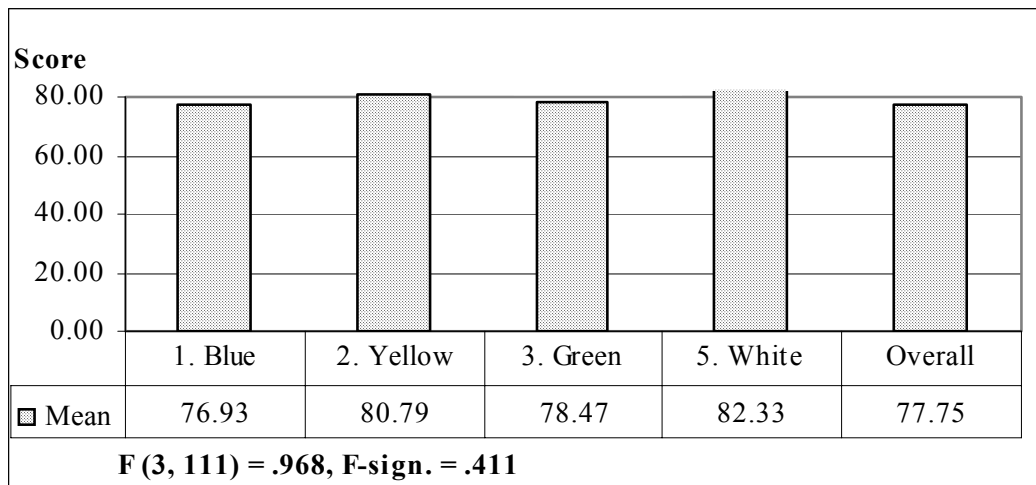
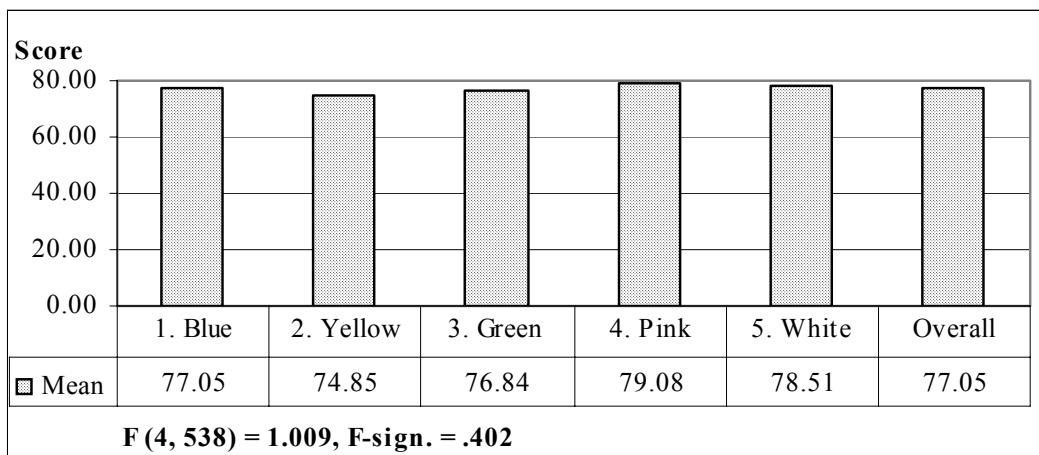


FIGURE 5
Mean Comparisons of Test Colors for All Classes



significant differences among the mean scores of different colors ($F = 1.009, p = .402$). This suggests that, when all exams in four classes are combined, at aggregate level the colors of the tests did not have any significant effect on student exam performance.

CONCLUSIONS AND LIMITATIONS

This study investigated the effects of different test colors on student exam performance in four different business

classes. The analysis was conducted at three different levels of aggregations. That is, the mean comparisons were done for each of 17 exams, next for each of four classes, and finally for exams in all classes combined. The mean comparison for each of all 17 exams found no significant differences between the mean scores of different test colors, where the mean scores for test colors varied randomly without one test color consistently having higher or lower mean scores. The mean comparisons for each of the four classes showed that some of means for test colors

in one class (legal and social environment 2) were significantly different, where students with white tests scored highest. This finding contradicts the earlier research that white paper seemed to be problematic (Mears 1980) and might have an adverse effect on comprehension and test performance (Irlen 1991).

The mean scores for test colors in other three classes were not significantly different, indicating that test color did really not matter for student test performances in these classes. Finally, when all the exams in all four classes were combined, the study found no significant differences between the mean scores of test colors. This further indicates that the test color did not have any significant effect on student exam performances. The significant mean differences in one class could have been caused by some other factor(s), rather than test color. Based on the results of various analyses, it is safe to conclude that the color of the tests does not appear to be detrimental to student test performances. Students who are taking exams with colored paper do not seem to gain any “unfair” advantage in exams, which is consistent with previous research (Shacklett et al. 2005).

While the results provide some insights into the effects of test color on student exam performance, the study have several limitations. First, there were four business classes included in the study. Additional business classes and/or non-business classes could strengthen the results. Second, the study was conducted with students at only one university. Finally, all of the exams utilized multiple-choice questions. Therefore, a caution should be exercised when generalizing the findings of this to non-business classes, to other disciplines, or to other universities. It is recommended that future research should include more classes from different disciplines at different universities.

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Musa Pinar
College of Business Administration
Valparaiso University
Valparaiso, IN 46383
Phone: 219.464.5401
E-Mail: musa.pina@Valpo.edu

Chris Fogliasso
Department of Management and Marketing
College of Business Administration
Pittsburg State University
1701 S. Broadway
Pittsburg, KS 66762
Phone: 620.235. 6010
E-Mail: chrisfog@pittstate.edu

LEARNING STYLES OF MARKETING STUDENTS: EXPLORATORY RESEARCH USING ILS

Mary Galvan, North Central College

ABSTRACT

The *Index of Learning Styles* (ILS) was administered to 95 college students who declared Marketing as their major or minor field of study. The purpose of the exploratory research was to assess students' preferences on four dimensions: active-reflective, sensing-intuitive, visual-verbal, and sequential-global, and to compare those preferences to the current pedagogy used to teach the introductory marketing course. The question of whether the student's gender played a role in learning style preferences was also examined. Overall, it was concluded that the majority of students would benefit from teaching methods that emphasized the needs of active, sensing, visual, and sequential learners.

LEARNING STYLE MODELS

Researchers have developed and used various models to identify learning style differences and their effects on student performance and attitudes. Among some popular models are the: Myers-Briggs Type Indicator (Lawrence 1993), Hermann Brain Dominance Model (Herrmann 1990), Felder-Silverman Learning Style Model (Felder and Silverman 1988), and Kolb Learning Style Model (Kolb 1984).

The *Index of Learning Styles* (ILS), created in 1991 by Richard Felder and Barbara Soloman, was adapted from the Felder-Silverman Learning Style Model. The first version of the 28-item instrument was administered to several hundred engineering students and the data were subjected to a factor analysis. New items to create the current 44-item version of the instrument replaced items that did not load significantly on single factors. The ILS was installed on the World Wide Web in 1996 and gets over 500,000 hits per year (Felder and Soloman 2005).

The current version of ILS consists of four dichotomous dimensions and a student's learning style can be defined in terms of the answers to the following questions (Felder 1993):

1. How does the student prefer to process information: *actively* – through engagement in physical activity or

- discussion, or *reflectively* – through introspection?
2. What type of information does the student preferentially perceive: *sensory* – sights, sounds, physical sensations, or *intuitive* – memories, ideas, insights?
3. Through which modality is sensory information most effectively perceived: *visual* – pictures, diagrams, graphs, demonstrations, or *verbal* – sounds, written and spoken words and formulas?
4. How does the student progress toward understanding: *sequentially* – in a logical progression of small incremental steps, or *globally* – in large jumps, holistically?

RESEARCH METHODOLOGY

ILS was chosen for this particular study because it is one of the few instruments for which validity and reliability data have been collected for student populations (Felder and Spurlin 2005; Litzinger, Lee, Wise, and Felder 2005; Zywno 2003, Livesay, Dee, Nauman; Hites 2002).

The ILS was administered to 95 college students who declared Marketing as their major or minor field of study during the winter 2005 term. Students were given a printed version of the ILS questionnaire that consisted of 44 incomplete sentences to which an "a" or "b" response could be selected to finish the statement. The questionnaire took approximately 10-15 minutes to complete. The responses of students were submitted on-line and a profile for each student was returned with scores on all four dimensions. Each learning style dimension was scored on a scale from -11 to +11 and showed an emerging preference for the given modality. Frequency distributions for each dimension were generated and analyzed in the next section.

In particular, a score of 1 to 3 in either dichotomy of a dimension reflected a learning style preference that is fairly well balanced on the two dimensions of that scale. A score of 5-7 illustrates a moderate preference for one dimension of the scale. In this case students will learn more easily in a teaching environment that favors that dimension. A score of 9-11 represents a very strong preference for one dimension of the scale. Students may

have difficulty learning in an environment that does not support that preference.

DATA RESULTS AND ANALYSIS

Data presented in Table 1 shows the frequency distributions for each of the four dichotomous dimensions: active-reflective, sensing-intuitive, visual-verbal, and sequential-global. Of the respondents 48.4 percent have balanced preference in the active-reflective dimension. Moderate active and strong active represent 34.7 percent and 5.3 percent respectively. Only 11.6 percent of the respondents were in the moderate reflective dimension and no one was strongly reflective.

In the sensing-intuitive dimension 41 percent of the students have a balanced preference with 29.4 percent representing moderate sensing and 11.6 percent strong sensing. In the moderate intuitive dimension were 12.6 percent of the responses and only 5.4 percent fell in the strong intuitive.

The visual-verbal dimension showed the largest percentages favoring a particular preference. Of the 95 students 36.8 percent have balanced preference, 30.5 percent have moderate visual and 27.4 percent have strong visual. Only 3.2 percent represented moderate verbal and 2.1 percent strong verbal.

In the sequential-global dimension, 57.8 percent of the respondents were balanced learners, 25.3 percent have

moderate preference for sequential and 5.3 percent have a strong preference for the sequential learning style. Moderate global responses were 10.5 percent followed by strong global of only 1.1 percent. Thus, looking at the data, it appears clear that the majority of students responding to the ILS survey would benefit from teaching methods that correspond to the needs of active, sensing, visual, and sequential learners.

DATA ANALYSIS BY GENDER

Of the 95 student respondents 39 were male and 56 were female. In this section data were analyzed based on gender for each of the four learning style dimensions to see if there were any noticeable differences between the genders.

In Table 2 the percentage of males who represented a balance in the active-reflective dimension was 59 percent compared to 41.1 percent of females. Student responses to moderate active and strong active were 28.2 percent and 2.6 percent respectively of the males and 39.3 percent and 7.1 percent of the females. Of the male population 10.2 percent fell into the moderate reflective and 12.5 percent of the female population were in the moderate reflective dimension. There were no males or females that were strong reflective.

Table 3 shows that 43.5 percent of the males and 39.3 of the females were balanced between sensing and intuitive. In the moderate sensing dimension there were 28.2 per-

TABLE 1 Frequency Distributions for All Learning Dimensions							
Preference	Percent Freq.	Preference	Percent Freq.	Preference	Percent Freq.	Preference	Percent Freq.
Strong Active	5.3	Strong Sensing	11.6	Strong Visual	27.4	Strong Sequential	5.3
Moderate Active	34.7	Moderate Sensing	29.4	Moderate Visual	30.5	Moderate Sequential	25.3
Balanced Act-Refl.	48.4	Balanced Sen-Int.	41.0	Balanced Vis-Verb.	36.8	Balanced Seq-Glob.	57.8
Moderate Reflective	11.6	Moderate Intuitive	12.6	Moderate Verbal	3.2	Moderate Global	10.5
Strong Reflective	0.0	Strong Intuitive	5.4	Strong Verbal	2.1	Strong Global	1.1
Total	100%	Total	100%	Total	100%	Total	100%

TABLE 2
Frequency Distributions for Active-Reflective by Gender

Preference	Percent Freq. Males Sample size = 39	Percent Freq. Females Sample size = 56
Strong Active	2.6	7.1
Moderate Active	28.2	39.3
Balanced Active-Reflective	59.0	41.1
Moderate Reflective	10.2	12.5
Strong Reflective	0.0	0.0
Total	100%	100%

TABLE 3
Frequency Distributions for Sensing-Intuitive by Gender

Preference	Percent Freq. Males Sample size = 39	Percent Freq. Females Sample size = 56
Strong Sensing	10.3	12.5
Moderate Sensing	28.2	30.4
Balanced Sensing-Intuitive	43.5	39.2
Moderate Intuitive	10.3	14.3
Strong Intuitive	7.7	3.6
Total	100%	100%

cent of the male students and 30.4 percent of the female students. Strong sensing was chosen by 10.3 percent of males and 12.5 percent of females. On the opposite side of the spectrum moderate intuitive and strong intuitive represented 10.3 percent and 7.7 percent respectively of the male students and 14.3 percent and 3.6 percent respectively of the female students.

Table 4 showed that of the males in the visual-verbal dimension, 33.3 percent were balanced learners, 43.6 percent were moderate visual learners, and 23.1 percent were strong visual learners. No male respondent preferred either moderate verbal or strong verbal. Of the females in the visual-verbal dimension, 39.3 percent were balanced learners, 21.4 percent were moderate visual learners, and 30.3 percent were strong visual learners. Only 5.4 percent of the females preferred moderate verbal and 3.6 percent preferred strong verbal.

Data presented in Table 5 show that 56.4 percent of the male respondents have balanced preference in the sequen-

tial-global dimension. Males represent 20.5 percent preference for moderate sequential and 7.7 percent preference for strong sequential. In the moderate global dimension, male preference was 15.4 percent. No male students fell in the strong global category. Table 5 shows that 58.8 percent of the female respondents have balanced preference in the sequential-global dimension. Females represent 28.6 percent preference for moderate sequential and 3.6 percent for strong sequential. In the moderate global dimension, female preference was 7.2 percent and only 1.8 percent in strong global. Although percentages between females and males differed (sometimes only slightly and other times more significantly), the overall preference for both males and females was towards active, sensing, visual and sequential dimensions.

TEACHING STYLES AND STRATEGIES

Just as a student's learning style may be defined in large part by the answers to the four questions listed in an earlier section of this paper, so too, teaching style may also be

TABLE 4
Frequency Distributions for Visual-Verbal by Gender

Preference	Percent Freq. Males Sample size = 39	Percent Freq. Females Sample size = 56
Strong Visual	23.1	30.3
Moderate Visual	43.6	21.4
Balanced Visual-Verbal	33.3	39.3
Moderate Verbal	0.0	5.4
Strong Verbal	0.0	3.6
Total	100%	100%

TABLE 5
Frequency Distributions for Sequential-Global by Gender

Preference	Percent Freq. Males Sample size = 39	Percent Freq. Females Sample size = 56
Strong Sequential	7.7	3.6
Moderate Sequential	20.5	28.6
Balanced Sequential-Global	56.4	58.8
Moderate Global	15.4	7.2
Strong Global	0.0	1.8
Total	100%	100%

defined in terms of the answers to four questions (Felder 1993):

1. What mode of student participation is facilitated by the presentations: *active* – students talk, move, reflect or *passive* – students watch and listen?
2. What type of information is emphasized by the instructor: *concrete* – factual, or *abstract* – conceptual and theoretical?
3. What mode of presentation is stressed: *visual* – pictures, diagrams, films, demonstrations, or *verbal* – lectures, readings, discussions?
4. What type of perspective is provided on the information presented: *sequential* – step-by-step progression (the trees) or *global* – context and relevance (the forest)?

Studies have shown that students are more successful in classes where their learning styles are similar to the teaching styles of the professor. However, the purpose of identifying learning styles is not so that professors can change their teaching style and tailor instruction to meet

students’ preferences. Ideally, instructors need to find a balanced teaching approach that meets the needs of all their students.

For Marketing students to function effectively in the business world they will need skills typical of each type of learner: the ability of active learners to work in groups coupled with their willingness to try things out and the ability of reflective learners to think things through; the practicality of sensors and the imagination of intuitors; the capability to understand information presented both visually and verbally; the linear thinking process of sequential learners and the holistic thinking process of global learners.

ONE APPROACH TO TEACHING AN INTRODUCTORY MARKETING COURSE

Unfortunately, many introductory Marketing courses tilt towards the students who are reflective, intuitive, verbal and sequential learners. Courses tend to be primarily lecture-based with a splattering of real-world examples,

applications using technological tools, and team projects. Since the results of the research conducted in this study indicate that marketing students tend to be active, sensing, visual, and sequential learners, the following teaching method was attempted during the Spring 2005 term.

Rather than have students sit in typical theater style rows, during the first class period each student drew a number – one through eight – from a box. Students were then asked to arrange their desks in groups of four based on the number they drew. This group constituted the student’s team they would be working with throughout the 10-week term. Before each class period began students were asked to arrange their desks in the four-person pod and throughout the entire term each class period was divided into two parts: one portion was lecture oriented and the other was application-oriented.

During the lecture portion of the course both factual and conceptual material was introduced. Many more visuals were used to illustrate the concepts. Throughout the lecture short case studies or “mini problems” were frequently injected. The students needed to work together as a team to formulate answers. Thus, the professor stopped talking and allowed the students to talk among themselves and think through new information.

During the term, three guest speakers from the business community were invited to speak to the class on various marketing related topics. Each speaker talked for a short period of time. They then introduced a problem or issue facing his/her company and asked the groups to brainstorm solutions to that problem. Students were given a few minutes to think of solutions individually and then asked to share and brainstorm with their team additional solutions that were summarized and presented to the whole class.

At the beginning of the term each team drew from a box the name of a particular industry. Students were then asked to develop a new product for that industry. They were to explain, in detail, the marketing mix that would be applied to that new product. During the application portion of each class period, students were asked to work with their team on the various stages of the project. This was presented to the class at the end of the term orally and submitted as a term paper. Although students typically worked through these projects in sequential steps, they were also attuned to the global nature of the project as they worked towards the end result.

Although not a requirement, many students used their teams as study groups to prepare for the two class exams and the final exam. Students were encouraged to have each team member take turns explaining the different topics and answering questions. Student teams were asked

to speculate what questions would be asked on the upcoming exams and figure out how they might answer the questions. Students who did not wish to study for exams with their team were urged to study with their notebooks and textbooks closed. In other words, make a brief list of all the concepts and material discussed for the test. Use a scratch piece of paper for each concept, the student would write out it’s explanation with an appropriate application. If the student could do that adequately, he would move on to the next concept. Material that this could not be done would need to be studied in more detail and the process repeated.

In general, students received higher overall grades for the course than in previous terms. Further research is needed in this area before conclusive results can be drawn.

In future introductory Marketing courses it may be useful to make each team member aware of their learning style to possibly reduce any potential group conflict. In addition, helping students identify their individual learning style could help them understand their strengths and weaknesses and lead to better overall academic performance. However, for this to be beneficial, it would be necessary to talk about learning styles in general so that students do not discount their own judgment nor do they overlook the fact that no matter what type of learning style the ILS instrument indicates, they can succeed in any profession or endeavor.

LIMITATIONS

In future research running chi-squares and testing for differences between male and female learning style preferences should be considered rather than analyzing only frequency distributions. It is possible that there are cultural differences in learning styles as well. The 95 students who responded to the ILS in this study were predominantly Caucasian so no multi-cultural analysis could be performed.

CONCLUSION

In this research the *Index of Learning Styles* (ILS) was given to 95 Marketing majors or minors to assess their learning styles based on four dimensions: active-reflective, sensing-intuitive, visual-verbal, and sequential-global. Overall, 48.4 percent of the respondents have a balanced preference in the active-reflective dimension; 41 percent of the students were balanced in the sensing-intuitive dimension; 36.8 percent were balanced in the visual-verbal dimension and 57.8 percent of the respondents were balanced learners in the sequential-global dimension. When adding the moderate and strong preferences for each dimension it appeared that the majority of students would definitely benefit from teaching methods

that emphasized the needs of active, sensing, visual, and sequential learners.

Of the 95 student respondents 39 were male and 56 were female. The same type of data analysis was performed to observe whether there was a difference in responses between the genders. Overall, 59 percent of males and 41.1 percent of females represented a balance in the active reflective dimension; 43.5 percent of males and 39.3 percent of females were balanced between sensing and intuitive; 33.3 percent are balanced male learners and 39.3 percent are balanced female learners for the visual-verbal dimension; and 56.4 percent of the males and 58.8 percent of the females were balanced in the sequential-global dimension. When adding the moderate and strong preferences for each dimension it was evident that the majority of males and females would benefit from professors who targeted the needs of active, sensing, visual, and sequential learners.

One approach to teaching an introductory Marketing course was employed in the Spring 2005 term. In this approach a balance between each of the learning style dimensions was attempted to be reached. The result was that students' overall final grades were higher than in previous introductory Marketing courses. However, further research needs to be conducted before conclusive results can be drawn.

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Mary Galvan
Marketing and Management
North Central College
30 N. Brainard Street
Naperville, IL 60540
Phone: 630.637.5473
E-Mail: mtgalvan@noctrl.edu

AN INTEGRATIVE MODEL OF BLOOM'S TAXONOMY OF THE COGNITIVE DOMAIN AND THE FOUNDATION FOR CRITICAL- THINKING FRAMEWORK WITH THE CASE ANALYSIS APPROACH IN MARKETING

T. Rick Whiteley, Calabash Educational Software

ABSTRACT

The task of learning how to analyze case studies correctly is one of the most difficult tasks for business students. To help students develop the prerequisite critical-thinking skills to carry out such analyses, incorporating Bloom's Taxonomy of the Cognitive Domain and the Foundation for Critical-Thinking framework as part of the case-analysis process is proposed. This approach to learning can be used in both traditional and virtual class settings.

INTRODUCTION

Case analysis is a common pedagogical approach used in many university and college business courses. It is an approach that is designed to allow students to apply the knowledge that they have learned in their courses of study in a decision-making setting. In order to achieve this learning objective successfully, students need to be taught how to think. However, when conducting case analysis, there is a tendency for students to focus on finding the *correct solution* to a case rather than to focus on the *process of analysis* (i.e., how did the student arrive at a decision). The latter learning objective is more important, since the case study or the problem-analysis situation can change, but the process of analysis remains the same.

Course instructors need to change their focus during case-analysis sessions by emphasizing the process of analysis, which, if done properly, will lead not only to the identification of the *correct or best solution* to the case, but it will also provide the student with an understanding as to why that solution is of this nature. In the field of nursing education, educators generally agree that better clinical judgments result when a student knows how to think versus just memorizes facts (Morrison and Free 2001). The same perspective would equally apply to the area of business education when dealing with case analysis.

One way to achieve the desired learning objective may be to incorporate Bloom's Taxonomy of the Cognitive Domain and the Foundation for Critical-Thinking framework (FCT) as part of the case analysis approach.

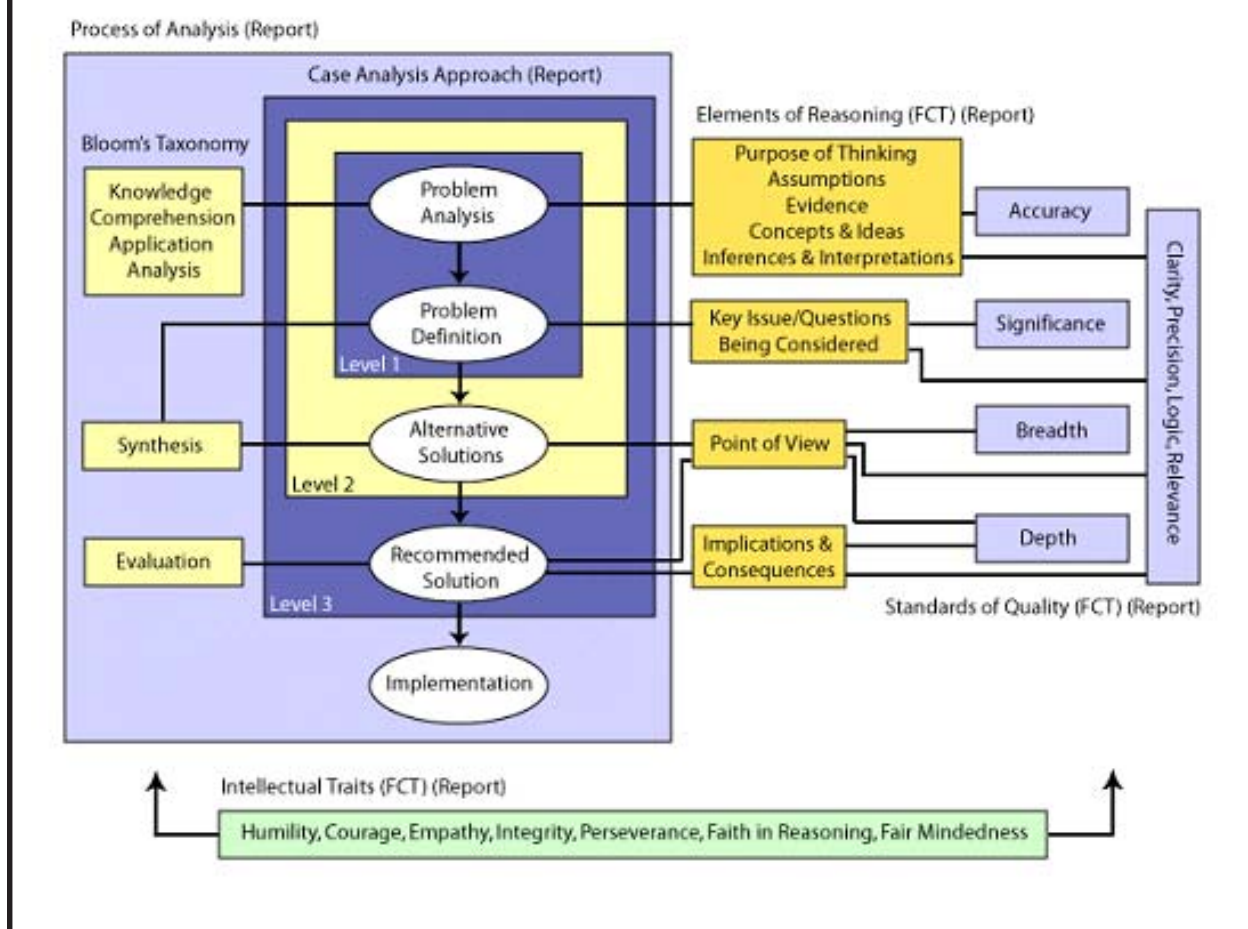
CASE ANALYSIS APPROACH

While there are a number of specific approaches to case analysis, the general approach requires the student to focus on the following areas: (1) Problem Analysis, (2) Problem Definition, (3) Identification of Alternative Solutions, (4) Evaluation of Alternatives, (5) Recommended Solution, and (6) Implementation. Progression through these stages is linear. Figure 1 shows the structure of the case analysis approach.

The *Problem Analysis* section contains a discussion of the situation facing the company or organization, a conceptual and theoretical analysis, the identification of the symptoms, and an explanation as to how the symptoms are related to what will be identified as the problem definition. The specific relevance of the theoretical/conceptual analysis is also identified. The *Problem Definition* section identifies the specific problem in the case that needs to be solved. The identified problem definition must be based on and be consistent with the problem analysis. Failure to identify the actual problem (or problems) will result in the rest of the case analysis being meaningless. The *Alternative Solutions* evolve from the problem definition and the problem analysis. For each alternative solution, and from the point of view of solving the identified problem, the advantages, disadvantages, and implications of selecting each alternative are discussed. Based on this analysis, the *Recommended Solution* is identified. Finally, the *Implementation* of the selected alternative is set out.

What quite often happens in case analysis is (1) that the problem definition is not correctly or clearly identified;

FIGURE 1
An Integrative Model of Bloom's Taxonomy of the Cognitive Domain and the Foundation for Critical Thinking (FCT) Framework with the Case Analysis Approach in Marketing



(2) that the problem definition is inconsistent with the problem analysis; (3) that the problem analysis is weak, particularly with respect to identifying the relevant theories and concepts; (4) that the symptoms are incorrectly identified as problems; and (5) that the alternative solutions are not consistent with the problem definition. To avoid these outcomes, a greater focus has to be placed on the *process of analysis* so as to help students understand why the analysis is off target. This is a difficult task for an instructor, since each student assumes ownership of and reflects high personal involvement with the resulting case analysis report.

Telling a student that his or her submission is inadequate, and grading it accordingly, is not going to help the student learn the case analysis approach. There must also be an assessment of the student's explanation as to how the student arrived at a final solution and an assessment of the student's statement of self-reflection. Along with the

normal case analysis report, students, therefore, need to prepare and submit additional documentation, documentation which is based on Bloom's Taxonomy and the FCT framework. Specifically, what needs to be submitted by each student are a *case-analysis* report, a *process of analysis* report, an *elements of reasoning* report, and an *intellectual traits* report.

Prior to the submission of the intellectual traits report, the course instructor evaluates the student's other submissions and prepares a *standards of quality* report, which is returned to the student. Based on this latter report, and all other submissions, and class discussions, the student prepares the intellectual traits report. The sequential relationship among the reports required in the integrative model, compared to what is required in the traditional case report submission approach, is shown in Figure 2. The *process of analysis* report links Bloom's Taxonomy with the case-analysis approach. The *elements of reasoning*,

FIGURE 2
Report Submission Requirements Under the
Traditional Approach vs. the Integrative
Model Approach

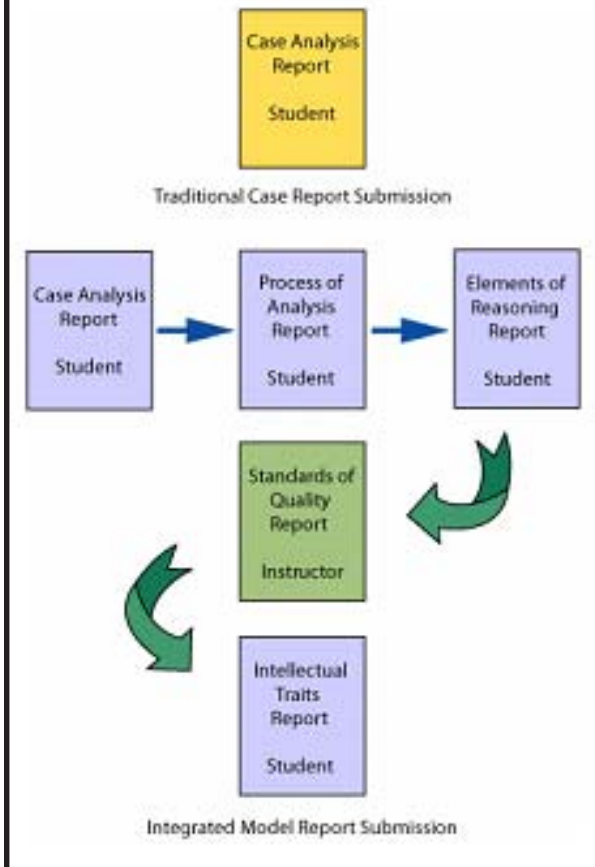


Figure 2 Note: The *Process of Analysis Report* is related to Bloom’s Taxonomy. The *Elements of Reasoning Report*, the *Standards of Quality Report* and the *Intellectual Traits Report* are related to the Foundation for Critical-Thinking Framework.

standards of quality, and the *intellectual traits* reports relate to the FCT framework.

The additional submissions are designed to help the instructor evaluate a student’s case analysis; to help the student better understand the issues underlying the process of analysis and any problems associated with the submitted case analysis; and to help the student reflect, from a metacognitive perspective, on the entire pedagogical exercise. As Paul (1995) states, the goal is to get one to think about one’s thinking (i.e., metacognition) in order to improve such thinking by making it clearer, more accurate, and more defensible. To accomplish this goal, students need to develop both cognitive and affective

thinking skills (Black 2005). And since self-reflection is conceptualized as a multi-level, critical-thinking construct [i.e., comprising cognitive, affective, discriminant, judgmental, conceptual, psychic, and theoretical levels] (see Jensen and Joy 2005; Mezirow 1981), feedback from the instructor and other classmates is even more important in order for the student to determine the extent and level of one’s reflectivity.

BLOOM’S TAXONOMY OF THE COGNITIVE DOMAIN AS APPLIED TO CASE ANALYSIS IN MARKETING: THE PROCESS OF ANALYSIS REPORT

Bloom’s taxonomy of educational objectives (cognitive domain) (Bloom et al. 1956) has guided the pedagogical process for half a century. The original taxonomy identifies six levels of learning through which a student can progress. The six levels, which, sequentially, can be considered as a hierarchy (Woolfolk 1990), are knowledge, comprehension, application, analysis, synthesis, and evaluation. The *knowledge level* focuses on whether the learner can recall, recognize, or identify specific information (e.g., identify the four components of the marketing mix). The *comprehension level* focuses on whether the learner understands the meaning of a content area (e.g., explain the meaning of each component of the marketing mix). The application level focuses on whether the learner can apply a content area (e.g., determine the breakeven point in units). The *analysis level* focuses on whether the learner can see patterns in the material presented and is able to separate the material into its constituent parts (e.g., explain how the product life cycle applies to the case study). The *synthesis level* focuses on whether the learner can establish new relationships (e.g., suggest alternative solutions to solve the identified problem in the case study). The *evaluation level* focuses on whether the learner can evaluate (assess) alternatives or suggested relationships and arrive at an appropriate solution (decision) based on a reasoned assessment of the situation (i.e., recommend the best solution to the problem identified in the case study).

Knowledge, comprehension, and application are considered to reflect lower-order learning; and analysis, synthesis, and evaluation are considered to reflect higher-order learning (Woolfolk 1990). Since critical thinking is a higher-order learning state, requiring a student to go beyond the basic facts, understanding, and application levels and to use reasoned thinking to gain the insight required to deal with the case situation is much more difficult than what is required at the lower-ordered level of learning. Because of this difficulty, the role of the instructor as a teacher/facilitator when teaching the case-analysis approach assumes greater importance.

The Process of Analysis Report

The relationship between the case analysis approach and Bloom's Taxonomy from the perspective of the *process of analysis* is shown in Table 1 and Figure 1. Problem analysis requires knowledge, comprehension, application, and analysis. Problem analysis serves as the input for problem definition. Problem definition requires synthesis. Problem analysis and problem definition (Level 1) serve as the input for alternative solution generation. Identifying the alternative solutions requires synthesis. Problem analysis, problem definition, and alternative solution generation (Level 2) serve as the input for the recommended solution. Determining the recommended solution requires evaluation. Implementation of the recommended solution is based on the output of all of the previous levels (Level 3). A similar framework linking the case analysis approach and Bloom's Taxonomy proposed by Braun (2004) focuses on the critical thinking skills applied rather than on the process of analysis.

For students to effectively analyze cases, they need to know the relevant subject area and case facts (knowledge), to understand the meaning of this knowledge and to be able to identify the concepts and theories relevant to the case (comprehension), to use abstract ideas in actual situations (application), to decompose the case material into its constituent parts (analysis), to develop new ideas based on the information analyzed (synthesis), and to select appropriate theories, concepts, approaches-techniques to solve a particular problem (evaluation). Having each student complete a record of the *process of analysis* for each level of Bloom's Taxonomy, as set out in Table 1, along with a case analysis report, will help the student better understand the process of analysis and allow the student and the course instructor to identify areas of sound analysis and areas of weakness, with the hope that the such efforts will lead to an improvement in future case analyses.

In a separate report, each student is required to provide the information identified in Table 1. None of the information sought in Table 1 is asking about the direct solution to the case; rather, the information focuses on the process of analysis (i.e., how the student arrived at specific decisions and conclusions). This latter task will be more difficult than just analyzing the case, but it highlights the fact that it is not the case content that is important; rather, it is the process by which one arrives at a solution which is important. It is not the case content which the student is to take away from the course; it is an understanding about how to analyze cases which is to be taken away. The *process of analysis* report, like the case analysis report, should be subject to assessment by the course instructor. The three remaining required reports, two being student-generated and one being instructor generated, relate to the FCT framework.

THE FOUNDATION FOR CRITICAL-THINKING (FCT) FRAMEWORK AS APPLIED TO CASE ANALYSIS IN MARKETING: THE ELEMENTS OF REASONING, STANDARDS OF QUALITY, AND INTELLECTUAL TRAITS REPORTS

Critical thinking, as applied to the area of marketing, can be defined as an intellectual skill that enhances one's ability to identify, to analyze, and to effectively solve marketing problems. The critical-thinking approach developed by the Foundation for Critical Thinking (1997) provides an appropriate framework to further develop the critical-thinking skills (i.e., problem-analysis skills) of marketing students so that they can become autonomous, self-directed, lifelong learners (Candy 1991; Celuch and Slama 1999). This perspective, again, highlights the fact that it is not the case content that is important, but, rather, it is the process of analysis directed toward the development of critical-thinking skills that is important.

The Foundation for Critical Thinking (FCT) framework focuses on (1) the required elements of reasoning, (2) the standards to use for judging the quality of critical-thinking, and (3) the resulting intellectual traits sought by engaging in such an exercise. Thus, based on the FCT framework, any critical-thinking effort can be evaluated by focusing on the elements of reasoning; the quality of the effort can be evaluated by focusing on the standards used for judging the quality; and the improvement in critical-thinking skills can be determined by focusing on the change in intellectual traits.

The FCT framework represented in Tables 2, 3, and 4 has been adapted to a marketing case-analysis context. The *elements of reasoning* include the following: purpose of thinking, key issue or question being considered, assumptions, point of view, evidence (i.e., data, information), concepts and ideas, inferences or interpretations, and implications and consequences. The focus of each element in a marketing case-analysis context is presented in Table 2. The *standards for judging the quality* of the critical-thinking exercise include consideration of the following: clarity, accuracy, precision, relevance, depth (difficulties, complexities), breadth (different perspectives or points of view), logic, and significance (recognize most important problem and factors). The focus of each of these standards in a marketing case-analysis context is shown in Table 3.

The desired *intellectual traits* sought by engaging in critical thinking are humility (recognize one's own limits and capabilities), courage (positively deal with viewpoints that conflict with one's own), empathy (recognize the reasoning of others), integrity (maintain rigorous standards of performance), perseverance (deal with obstacles through insight), faith in reasoning (confidence

TABLE 1
Process of Analysis Linking Bloom's Taxonomy with the Case Analysis Approach

Case Analysis Stage	Process of Analysis
Problem Analysis	<ol style="list-style-type: none"> 1. Based on the case facts (Knowledge), and given the list of identified marketing theories and concepts (Knowledge/Analysis), provide support for each of the identified theories and concepts. (Comprehension) 2. For any calculations carried out during the analysis, explain why these techniques were selected? For any theoretical or conceptual approaches applied in the analysis, explain why these approaches were used? (Application) 3. Explain how the identified symptoms in the case are in fact symptoms to what will become the identified problem (cause and effect)? (Analysis) 4. Given any assumptions made, explain why it was necessary to make such assumptions. (Analysis)
Problem Definition	Based on the Problem Analysis, explain how the Problem Definition was determined? (Synthesis)
Alternative Solutions	Based on the Problem Definition, explain how each alternative solution was determined, how the identified advantages are in fact advantages, how the identified disadvantages are in fact disadvantages, and why the identified implications, if the alternative is selected, are in fact implications? (Synthesis)
Recommended Solution	Explain why the recommended solution was selected, how you determined that the recommended solution would solve the problem in the case, and how you determined what the status of the identified symptoms to the case problem would be by selecting this solution. (Evaluation)
Implementation	Explain how the nature of the implementation of your recommended solution was determined. Relate your answer to the relevant information presented in this report. (All levels of Bloom's Taxonomy)

that all will benefit), and fair mindedness (treat all viewpoints alike and in a positive manner). Table 4 presents the focus of each trait in a marketing case-analysis context.

The Elements of Reasoning Report

The *elements of reasoning* component of the FCT framework (see Table 2) parallels the case-study approach, but from a slightly different perspective. The focus of the report based on the elements of reasoning is to determine the nature of the thought process carried out by the student in analyzing the case versus just focusing on the direct analysis and solution. Rudd and Ricketts (2001) developed a modified version of the elements of reasoning component (combines purpose of thinking and key issue/

questions being considered) which also reflects the case-study or problem-situation approach.

The relationship between the case-analysis approach and the *elements of reasoning* is shown in Figure 1. The elements of purpose of thinking, assumptions, evidence, concepts and ideas, and inferences and interpretations relate to the problem analysis area of the case-analysis approach; the key issue/questions being considered element relates to the problem definition area; the point of view element relates to the alternative solutions and recommended solutions areas; and the implications and consequences element relates to the recommended solution area. Since the points of view element includes the eventual recommended solution, it relates to both the alternative and recommended solution areas.

TABLE 2
Elements of Reasoning

Elements	Explanation
Purpose of Thinking	Identify why the entity (e.g., marketer) in the case needs to be concerned with the issue at hand. This element will often focus on the symptoms of the problem. By correctly solving the problem, the symptoms should disappear or become irrelevant. Remember, low sales and low profits are always symptoms of a problem. Symptoms are the result of a problem; they are never the problem or the cause of the problem.
Key Issue/Questions Being Considered	What is the marketing problem that needs to be solved in the case? Is there more than one problem? Is one more important than the others? Can the problems be addressed together or are separate analyses required? Make sure that the problem definition is clear and precise so that it will be clear that the recommended solution solves the problem.
Assumptions	Sometimes, it is necessary to assume certain things about the marketing situation being addressed, because of the lack of information. However, be careful not to make unsubstantiated assumptions – the assumptions must be logical relative to the case situation. The assumptions must also be necessary in order to solve the <i>correct problem</i> existing in the case. Be careful that you are not making assumptions to help you substantiate an incorrect problem. What assumptions have you made? Why?
Point of View	Identify your point of view about the situation in the case and identify the different alternatives that are designed to address the problem in the case. Your recommended solution will be your point of view. The other alternative solutions identified but rejected will be the other points of view. What are the strengths (advantages) and weaknesses (disadvantages) of each alternative? Do the alternative solutions cover all relevant perspectives? Remember, maintaining the current strategy (i.e., the status quo) is always one of the alternatives to consider.
Evidence	Make sure that your analysis is based on the case data. Only use outside information if necessary and appropriate. Graphically illustrate how certain information is related, if necessary. Do not ignore relevant information, but do ignore irrelevant information. What evidence from the case have you used to solve the case? Why?
Concepts and Ideas	A critical part of any case analysis is the conceptual and theoretical analysis. What (marketing) theories and concepts are illustrated by the case information? How are they relevant to the problem definition and its solution? This part of the case analysis provides the insight required to correctly identify the case problem. It is also usually the most time consuming part of the analysis, but it is always time well spent. What other relevant theories and concepts exist in the case? Why are they relevant?
Inferences & Interpretations	Be aware of the inferences you make about the data in the case. Are they related to your (valid) assumptions? Are your inferences consistent with one another? Are your inferences supported by the data in the case? Are you interpreting the data and the situation in the case correctly? What inferences have you made? Why?
Implications & Consequences	What are the implications, both positive and negative, of your recommendations to all relevant parties in the case? What are the consequences of the recommendations? Will your recommendations create new problems and how will these problems be dealt with? How do the identified implications and consequences follow from the process of analysis conducted in solving the case?

TABLE 3
Standards of Quality

Standards	Explanation
Clarity	Are the statements of analysis clear and to the point (i.e., not wishy-washy)?
Accuracy	Are the statements being made correct and supported by case information or are they based on unsubstantiated assumptions?
Precision	Are the statements being made precise versus general in nature?
Relevance	Are the statements being made relevant to the problem analysis? Avoid dwelling on irrelevant or distracting information.
Depth	What are the difficulties and complexities that need to be dealt with when trying to solve the identified problem? Do such concerns lead to the avoidance of relevant information or reliance on unsubstantiated assumptions? Are the answers provided too simple for the level of complexity of the problem?
Breadth	Have all of the relevant points of view been considered in addressing the identified problem?
Logic	Do the statements being made fit together? Are they logical? Are the statements being made consistent with the case information? with the relevant theories and concepts?
Significance	Has the most important problem in the case been addressed? Have all problems been identified? Has the most important information in the case been taken into account?

TABLE 4
Intellectual Traits

Trait	Explanation
Humility	By carrying out the case analysis, have you come to recognize your own limitations and capabilities?
Courage	By carrying out the case analysis, have you developed the capability to deal with viewpoints that may conflict with your own in a positive manner?
Empathy	By carrying out the case analysis, have you developed the capability of understanding the reasoning underlying the viewpoints of others?
Integrity	By carrying out the case analysis, have you developed a greater willingness to maintain rigorous standards of performance?
Perseverance	By carrying out the case analysis, have you developed a greater willingness to deal with obstacles and problems through insight and continued focused effort?
Faith in Reasoning	By carrying out the case analysis, have you come to realize (and developed the confidence) that your efforts will have a positive benefit to all parties concerned?
Fair Mindedness	By carrying out the case analysis, have you developed a greater willingness to treat all viewpoints alike and in a positive manner?

A report based on the *elements of reasoning* component of the FCT framework is to be submitted along with the case report and the process of analysis report. Answers to the relevant questions in Table 2 serve as the content of the report. The elements of reasoning report is also subject to assessment by the course instructor.

The Standards of Quality Report

The report focusing on the *standards of quality* of the critical-thinking exercise is prepared by the course instructor, based on the case report, the process of analysis report, and the elements of reasoning report submitted by the student. However, in preparing these latter three reports, the student can also use the identified standards as a guide (see Table 3), since these standards serve as the rubric that will be used by the instructor for the purpose of assessment in this area. By using the standards of quality as a guide, the student should be able to prepare a more defensible point of view and be more able to critique the points of view of others (Rudd and Grage 2003). These standards also serve as a framework against which the student can analyze his or her thinking and remain focused (Black 2005) when preparing all reports.

Figure 1 shows the relationship between the *standards of quality* component and the different aspects of the proposed integrative model. For the relationship between the standards of quality and the *elements of reasoning* components, the standards of clarity, precision, logic, and relevance relate to all areas of the elements of reasoning. The standard of accuracy, however, best relates to the elements of purpose of thinking, assumptions, evidence, concepts and ideas, and inferences and interpretations. The standard of significance best relates to the key issue/questions being considered element. The breadth standard best relates to the point of view element. Finally, the depth standard best relates to the point of view and the implications and consequences elements. A parallel application of the *standards of quality* component would apply to the case analysis report and the *process of analysis* report based on the linkages shown in Figure 1.

The Intellectual Traits Report

Once the student receives feedback from the course instructor on his or her submissions to this point in the analysis process and through class discussion, the report focusing on the *intellectual traits* component of the FCT framework (see Table 4) can be prepared and then submitted to the instructor for assessment. This is probably the most difficult report for the student to prepare, since it entails a high level of self-reflection: The preparation of this report requires the student to critique all of one's own work and effort directly and relative to that of others and to assess the evaluations so far received from the course

instructor. Class discussion of the areas of consideration (see Table 4) for this report may also be helpful before final submission, since the answers to the relevant questions presented in Table 4 serve as the content of the report. Despite the need to carry out a self-critique of one's work and effort, this component of the critical-thinking process should provide the student with greater insight of the case analysis process and foster the development of a positive attitude toward the challenges of future case analysis assignments.

CONCLUSION

The proposed approach of integrating the case-analysis approach, Bloom's Taxonomy, and the FCT framework is designed to develop and enhance a student's critical-thinking skills. With this approach, each student has to submit a *case analysis* report, a *process of analysis* report, and an *elements of reasoning* report, all of which are subject to assessment. Based on these reports, the course instructor then prepares the *standards of quality* report and provides a copy to the student. At this point, and after all class discussion, the student then prepares and submits the *intellectual traits* report for assessment by the course instructor. This latter report can also be discussed in class prior or after final submission, so that all members of the class can benefit from the learning process.

The proposed pedagogical approach to case analysis requires greater effort in two ways. First, the submission of four reports for each case or problem analysis situation requires greater effort on the part of students (i.e., preparation) and on the part of the course instructor (i.e., assessment) (Black 2005; Visser, Visser, and Schlosser 2003). The submission and evaluation of just the case report and nothing more will no longer be the norm. A case report submission will become more than a "dead product" (Barnett 1993, p. 54); it will take on an extended life. Second, the task of learning the skill of and engaging in critical thinking will require greater effort (Petress 2004) on the part of the students (i.e., cognitive processing) and on the part of the course instructor [i.e., guidance and serving as a role model (Black 2005; Broadbear and Keyser 2000)]. Despite these issues, the end result should be better case reports and a deeper understanding of the case analysis process (cf., Rudd and Ricketts 2001). These goals can be achieved and time and effort commitments can be reduced by assigning short cases, at least initially.

With the theoretical foundation for the proposed approach to case analysis in place, it is now time for in-class implementation and empirical research to determine the efficacy of the approach. How will students and faculty who have utilized the approach respond? What do the empirical research results reveal? Are student critical-thinking skills improved? Is there an improvement in the

quality of the case report submissions? The opportunity for both qualitative and quantitative research exists. Future research can also investigate the level of self-reflection students achieve by using this approach.

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T. Rick Whiteley
Calabash Educational Software
RPO Box 43221 – Sheppard Centre
Toronto, ON
M2N 6N1, Canada
E-Mail: drtrw@calabash.ca

TEACHING WITH HANDS-ON EXPERIENCE: A LOGO SELECTION EXERCISE

Tulay Girard, Penn State Altoona

ABSTRACT

This paper demonstrates how educators can teach an abstract concept to students and simultaneously provide hands-on experience in the classroom. Although the concept presented in this paper may be more applicable to management and marketing courses than physical science courses, the steps can be adapted to enhance the learning experience. First, the paper outlines the steps for teaching an abstract concept. Second, it instructs teachers on how to walk students through an in-class learning experience.

INTRODUCTION

The example presented is designed for a consumer behavior course in marketing. One of the concepts that is often taught in a consumer behavior course is semiotics. Semiotics is the study of symbols and their meanings (Solomon 2004). One of the practical applications of semiotics is the selection of logos to build brand recognition by consumers. This paper will first outline the steps for teaching an abstract concept such as semiotics. Second, it will instruct teachers on how to walk students through an in-class learning experience. Finally, the paper will provide guidance for hands-on teaching practices applicable to most business courses (Figure 1).

THE METHOD FOR EFFECTIVE TEACHING OF AN ABSTRACT CONCEPT

A typical method of teaching a new concept is to define the concept followed by illustrative examples. Introducing a concept with the formal definition helps students learn the concept with the proper terminology. Illustrative examples help students to materialize the abstract concept. However, in order to understand how the concept is related to the real world, students need an explanation of why the concept is important to know, to what areas it applies, and what subsequent implications the application of the concept may have. A question and answer session between the educator and students would be an effective way to clarify and reinforce the importance, application, and implications of the concept. Appendix A provides an example of the steps with explanations of the concept of semiotics.

STEPS FOR IN-CLASS LEARNING EXPERIENCE

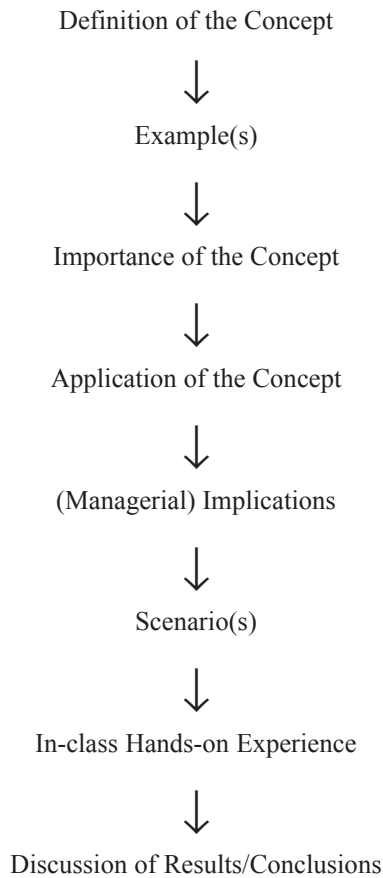
The next step is to teach students how the concept is applied to the business world in an in-class learning experience. A useful approach is to present a scenario in the class. The educator may describe a scenario: "Suppose that you are starting a company, you are looking for a logo or symbol that is most representative of your company and product(s) and also most appropriate for the industry your company is in. How would you come up with the logo?"

In the process of answering this question, the educator has the opportunity to introduce a managerial technique that is used to identify consumer perceptions or opinions on various issues – conducting focus groups or surveys. If the students are not familiar with the process of conducting a focus group, then the process should be explained. It should be pointed out that in a focus group or survey study, the participants should be drawn from a representative sample of the company's target segment.

In the in-class exercise, instead of conducting a focus group, a survey is used to identify the students' perceptions toward various symbols based on a list of bi-polar adjectives. The symbols of various companies can be gathered from the Internet, newspapers or magazine ads such as Wall Street Journal or Business Week. The bi-polar adjectives used in the survey are adapted from Bhat and Reddy (1998) (Appendix B).

The study consists of two parts. In part I, the students are presented each symbol and instructed to select the adjectives that best describe the symbol, and then rank the symbol based on how closely the symbol represents the selected adjective. In part II, the students are asked to select the most representative industry type for each symbol (Appendix B). The educator reads the instructions for Part I and demonstrates how the students would select an adjective and rank the symbol. The educator shows one symbol at a time by covering the others and allows adequate time for completion of selection of adjectives and ranking the symbols. The educator repeats the same steps for Part II of the survey and demonstrates an example.

FIGURE 1
Guidance for Teaching with Hands-on Experience



The learning experience is not complete unless the results are interpreted and conclusions are discussed after the exercise. At this point, the educator demonstrates how the data is entered into a spreadsheet (e.g., Excel), and the frequencies and bar graphs are created in order to interpret data. Because the data entry takes time, the results from the students' selections can be shown to the students during the next class meeting. Alternatively, the educator can demonstrate results from a prior in-class exercise if available. Repetitions of this exercise over the course of several semesters provide an opportunity to compare the results of several separate cross-sectional studies (opinions of the students on each symbol). The students in turn have the opportunity to see whether the answers by other students (their cohorts) are consistent. Consistency in responses is something that needs to be taken into consideration when making a managerial decision such as a logo selection.

In conclusion, this paper presents an example to business educators of how to teach an abstract concept with the application of a managerial technique used in decision making. The following summarizes the steps for teaching with hands-on experience.

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APPENDIX A

A Example for Effective Teaching an Abstract Concept

What is Semiotics?

Semiotics is a field of study that examines the association between signs and symbols and their role in the assignment of meaning (Mick 1986). Semiotics studies how consumers react emotionally to signs they come across in the environment and how they consciously and unconsciously derive meaning from them. Compelling evidence suggests that the unconscious mind may comprehend and respond to nonverbal symbols, form emotional responses, and guide human actions largely independent of conscious awareness.

From a semiotic perspective, marketing messages have three components: (1) object, (2) sign, and (3) interpretant. An *object* can be a product, service, brand, store, person, concept – the meaning of which is to be communicated (i.e., Energizer batteries). A *sign* is sensory imagery, such as a symbol or set of symbols that represents and communicates the intended meaning of the object (i.e., Energizer Bunny). The *interpretant* is the meaning derived from a sign (i.e., long-lasting life).

Importance of Semiotics:

“Semiotics is important to the understanding of consumer behavior because consumers use products to express their social identities” (Solomon 2004, p. 73). In order to understand how people emotionally react to symbols in the environment, one must gain an understanding of the shared meanings of various signs. Researchers doing work on semiotics emphasize that meaning is in part determined by the cultural context within which the sign is embedded. Thus, a sign in one culture may have an entirely different meaning from a sign in another culture. For example, associating animals with products is done frequently and effectively in the United States. However, in some Asian cultures, the practice is viewed negatively. Thus, an advertisement by an optical company showing cute little animals wearing eyeglasses failed miserably in Thailand because animals symbolize a lower form of life among many people in Thai culture. Therefore, the field of semiotics has particular importance in marketing communications. Marketing and advertising managers must be alert to the use of symbols and how their target market will interpret them.

Application of Semiotics:

Semiotics has particular application to the positioning of brands and advertising. For example, universities regularly refine their logos and mascots because a catchy symbol can communicate the image about the college. In addition to helping to position a university, the use of the logos on merchandise can bring in millions of dollars to a university through licensing to vendors the right to use the logo typically for about a dollar per use.

Managerial Implications

The use of semiotics has implications for product positioning and differentiation. The symbols and signs that are linked to a brand or organization provide meanings that are interpreted and associated by consumers. For example, brand names are frequently linked to symbols such as the automobile brands – Mustang, Jaguar, Riviera, and New Yorker.

APPENDIX B

Steps for In-class Learning Experience

SEMIOTICS STUDY – Part I

PURPOSE: This study is designed to measure appropriateness of symbols and their meanings.

INSTRUCTIONS: This study will require you to select adjectives for symbols and rank them.

The administrator will project one symbol at a time with an overhead projector. After everyone has completed selecting and ranking a symbol, a new symbol will be projected.

First, examine each symbol and select the best adjective(s) that describe(s) the symbol by placing an or in the box(s) next to the adjective(s). You may choose one adjective or as many adjectives that seem appropriate for the symbol.

Next, rank the adjectives that you selected by how closely the symbol represents the adjective. The most closely associated adjective will be ranked 1, the next most closely associated adjective will be ranked 2, and so on until all of the selected adjectives have a ranking number next to them.

The example below shows Symbol 99 and the completed symbol response list.



Symbol 99

- Sophisticated Simple

- | | |
|-------------------------------------|---|
| <input type="checkbox"/> Romantic | <input type="checkbox"/> Unaffectionate |
| <input type="checkbox"/> Successful | <input type="checkbox"/> Unsuccessful |
| <input type="checkbox"/> Unique | <input type="checkbox"/> Ordinary |
| <input type="checkbox"/> Expressive | <input type="checkbox"/> Low-key |
| <input type="checkbox"/> Glamorous | <input type="checkbox"/> Ugly |
| <input type="checkbox"/> Elegant | <input type="checkbox"/> Inelegant |
| <input type="checkbox"/> Stylish | <input type="checkbox"/> Plain |

If you have any questions concerning how to select and rank the adjective(s), please ask before the administrator starts the study. There will be no talking during the course of the study.

Please follow the administrator's instructions carefully as you are guided through the study.

Thank you for your assistance with this study!

SEMIOTICS STUDY – Part II

PURPOSE: This study is designed to measure appropriateness of symbols and their meanings.

INSTRUCTIONS: This study will require you to select an industry type for symbols.

The administrator will project one symbol at a time with an overhead projector. After everyone has completed selecting and ranking a symbol, a new symbol will be projected.

Examine each symbol and select the best symbol that represents an industry type by placing an or in the box next to the industry type. Choose only one industry type that seems appropriate for the symbol.

The example below shows Symbol 99 and the completed symbol response list.



Symbol 99

- | | |
|--|--|
| <input type="checkbox"/> Banking/Finance | <input type="checkbox"/> Pharmaceuticals |
| <input type="checkbox"/> Textile | <input type="checkbox"/> Mining |
| <input type="checkbox"/> Automotive | <input type="checkbox"/> Agriculture |
| <input type="checkbox"/> Electronics | <input type="checkbox"/> Transportation |
| <input type="checkbox"/> Communication | <input type="checkbox"/> Manufacturing |
| <input type="checkbox"/> Entertainment | <input type="checkbox"/> Hotel/Lodging |
| <input type="checkbox"/> Health Care | <input type="checkbox"/> Education |
| <input type="checkbox"/> Technology | <input type="checkbox"/> Construction |

If you have any questions concerning how to select the industry type, please ask before the administrator starts the study. There will be no talking during the course of the study.

Please follow the administrator's instructions carefully as you are guided through the study.

Thank you for your assistance with this study!

Tulay Girard
Penn State Altoona
3000 Ivyside Park
Altoona, PA 16601
Phone: 814.949,5259
E-Mail: tug1@psu.edu

FACULTY ISSUES IN INTERDISCIPLINARY TEACHING IS YOUR UNIVERSITY WALKING THE WALK OR JUST TALKING THE TALK?

Paul Lane, Grand Valley State University

John Farris, Grand Valley State University

ABSTRACT

Across the country at conference after conference academics are talking about the need to break out of the carefully constructed discipline silos. One way to do this is through interdisciplinary teaching. The faculty authors of this paper have been part of a number of different projects and have some questions to be raised if your school is considering interdisciplinary teams. These questions are aimed at administrators of all levels to help them put action behind the words. In the final analysis is your school prepared to walk the walk as well as talk the talk.

INTRODUCTION

This paper focuses on the issues faced by faculty in trying to create and support interdisciplinary courses. It does not argue the benefits of these courses to students or deal with student issues. Benefits to students for this paper are assumed. It raises faculty issues that must be dealt with in interdisciplinary courses and programs that are expected to grow. The issues focused on are time and credit for the faculty, scalability of the courses, promotion and tenure, and management issues. These are issues that the authors have experience as they engaged in starting three totally new interdisciplinary programs over the last five years in business and engineering. They are also being wrestled with in the three programs that they are working on currently. The earlier programs were more closely related to their disciplines. Now they find themselves on teams working on interdisciplinary programs that are widely divergent in the subject matter, such as gerontology certificate that would suit any undergraduate major, an interdisciplinary third world initiative, and finally the potential for a product centered social entrepreneurship program. While the first two are active committees and the third is in preliminary discussion they all face the same issues as the earlier programs. What issues to your interdisciplinary programs face?

Your university may have a commitment to the currently popular idea of breaking down the silos. At the author's University Interdisciplinary frequently is used by the

Provost, and there is now a whole college focused on Interdisciplinary Studies. This is great talk. However, there are many things that have not permeated through the system that would encourage or even make possible the interdisciplinary courses. The existence of the College of Interdisciplinary Studies suggests that there is a system in place. The reality is quite different. It seems to be very difficult to get the upper reaches of administration to work through the challenges of interdisciplinary teaching and make it more palatable for faculty.

TIME AND CREDIT

Administrators often act as though all classes are the same. In the case of interdisciplinary courses many administrators in fact ask questions like "Why are you concerned about time, you only have to do half the work?" Unfortunately the opposite is often true. Faculty members from different disciplines must spend hours figuring out what the common vocabulary should be. They can fill white boards trying to figure out which is the better model for student learning. They can spend time with students, successful business people and others trying to figure out what is really important for students? Why don't administrators grasp the increased time in preparation? Is it because they have never done it? Most administrators come from the teaching ranks. Why do they not understand the challenges of interdisciplinary work? Why don't they understand as the fields have become bigger, that it has become harder and harder?

There are three areas of particular difficulty in preparation that seem to require more time. These include:

- ◆ The lack of prepackaged course materials
- ◆ The lack of an appropriate text
- ◆ The lack of any direction on how to integrate different disciplines

Administrators who often have not taught in several years may have forgotten how hard it is to design a new course with a blank computer screen and two people from different disciplines.

First, the lack of prepackaged course materials is a big consumer of time. Frequently today when asked to look at a new or a different course, faculty are able to get a whole package of materials from two sources, those who have taught before in your school and from publishers. These are useful tools. It is often possible to build a first syllabus in a day with these aids. Obviously you will want to spend time reading, writing and refining. You do have the advantage of knowing where to start and some models to follow. The problem is that when there are no materials, there is no road map. Creating the road map consumes much faculty time and energy. It is also part of the richness that leads to new thinking and truly new courses being developed. It is what makes the courses such learning opportunities for students.

Second, in addition to the lack of packaged materials, frequently there is not an appropriate text. The lack of a text makes it even more difficult for the faculty team as they have to start from scratch to begin to accumulate materials and readings. Is this more time consuming than using an existing text? Why is this so? Some of these courses and programs are often developed due to local school and community needs, strengths and opportunities. They are not created to follow someone else's model. In the Midwest there are thousands without work because of the loss of manufacturing jobs. Creating a program that could help students develop innovations that would use some of that vacated manufacturing space and potentially the workers would be a logical high priority that may not be as important on the West Coast. Similarly a cluster of like minded people may develop at a university thus creating an opportunity to try something new. At the author's institution, chance meetings at the American Society on Aging conference have led to a renewed effort to develop a university wide certificate in Gerontology.

Third, integration takes a great deal of time. How long does it take you to make a decision on an item like a car by yourself? Now how long does it take you to make the same decision with your spouse or significant other? That may not be a good example but most faculty are particularly attached to their disciplines and the integration across the disciplines often involves making trade offs from one discipline to another. This is not easy. You have to learn and share each others discipline and then begin to come to agreement on what it is that is important for the students. What will be interesting for them, and challenge them to think. Why is it that administrators staring at charts of class numbers have trouble understanding how long all this takes? Many administrators in order to survive have become adept at being sure that all the boxes are filled. The administrators learn to focus on having enough sections at the right times, and enough students to fill them. How many administrators have time to wrestle with theory and how it is best taught?

How is the class treated at your school? At many schools each faculty members gets one half the credit. So you are teaching a three credit course with your colleague in Theater and you are getting rewarded for 1.5 credits. The reality of the work load is that for most of the classes both (or more) faculty need to be present all the time. What is hard about this concept for administrators to understand? For you it is still a trip to campus and another three hours in class. Would you rather teach one three hour class or two interdisciplinary classes for your three credits? The choice is not hard unless you are passionate about interdisciplinary teaching. Administrators wanting to encourage interdisciplinary courses may have to think of some new method of accounting for the time invested.

Is grading easier with two faculty members? Maybe, if you are teaching and grading sequentially and one at a time. You may have less work. If you are grading together will it be shorter? Actually having two people grade a paper takes a lot of time. You not only have to read it and think about it in terms of the grading rubric you have to agree with your colleague. How often do you think that you are going to agree on the grade without discussion?

In summary the authors experience is that faculty often get much less credit and put in much more time for an interdisciplinary course than would be put in for a regular course? What do you think would be true for you? What would be the practice at your institution? Administrators ought to give this some thought if they are trying to encourage interdisciplinary work in their institutions. Why do faculty members do this even if it is more work? Is it the passion for learning that causes faculty to work harder for less compensation per hour?

SCALABILITY

If the program is to be successful and grow then how will it grow is very important. What happens when it is time to add other sections? How do you do this? Not all faculty members have same capability! Not all faculty have the same motivation in the topic are of the interdisciplinary course. How are you going to motivate the faculty to teach subsequent sections? How will you reward those who follow the initiators? Even though the path has been chartered, there is still work for each team. How will the incentives be structured for future teams? This is not like being assigned another course and getting the syllabus of record and a text. It is a process of team formation, shared knowledge, and working through new materials where neither member may have been before.

One possible method of solving the need for additional faculty is hiring someone who wants to work in this interdisciplinary area. There are many complicated issues when hiring for these kinds of positions. What evidence is

there that this person has the potential for success in teaching the interdisciplinary course or program? Do candidates have interdisciplinary backgrounds? Do they have interdisciplinary experience?

One of the huge issues is what department gets to hire the person. In times of scarce resources and scarce lines for new faculty members what school and what department should get the line? Can't you imagine one Dean to another, "if you can not hire someone to fill the bill, we sure can!" This is a serious issue as the mix of faculty will impact the nature of the program.

A similar but extremely important faculty issue is whether the traditional hiring process works. What conferences should be attended, who should guide the recruiting? Is your university set up so you can have interdisciplinary teams in the hiring process. How will department A feel about having only 2 representatives on a committee of five with 2 reps from B and one from C? This is a huge problem. What chair will approve the hire? Are there two Deans involved in making the recommendation? What would happen if the hiring committee needed to span schools?

How does it change the course for students bringing in the new faculty member? Will the new faculty member be able to use the resources? Will the Theater department be content with the new interdisciplinary staff person in business using the theatre space for improvisation work if they had not had a voice in hiring the person? How safe is it for the sculptor to work in the engineering lab with students without being trained as the engineers? Will the engineers accept this person? The question to be focused on is does the process and the position description lead to hiring the kind of person that will continue the vision of the course.

Administrators may lose site of the scalability issues. They often think that this is not a complicated problem. While they want growth in programs they often are not looking far enough ahead at faculty needs. Why is this a problem in scalability? In most institutions this is a new process and it will take more time. Administrators are not used to looking far enough ahead to help grow interdisciplinary programs.

PROMOTION AND TENURE

Do colleagues value what you do in interdisciplinary courses? Are they supportive? Is it seen as an opportunity or a burden? Are you seen as advancing the area or just doing something that amuses you? Do they see this as an opportunity to grow the department or a drain on department resources? Are they worried that they might have to get involved? Do they see this as an opportunity for a new

concentration, minor, or major, in your department, or are they afraid you will be swallowed up by some other department? How does your faculty informally evaluate your involvement?

Does the Department value interdisciplinary work? The provost may be excited about interdisciplinary work but it may not be anywhere in the departmental policies so you are not getting credit for promotion, tenure or merit increases at that level. Interdisciplinary is a lot of work and can the faculty member expect any kind of recognition in the annual review by the department or department chair. These programs may be started out of passion but if they are to be sustained then people participating need to know that it will be included in the evaluation process.

Does the College value interdisciplinary work? The Dean may talk a great line about wanting to support interdisciplinary work but how is it supported? Where is it in the college mission statement, where is it in the college annual review process? When looking at teaching evaluations is it one of the factors, is their credit for the design of interdisciplinary programs and courses? Is it supported in the decisions on grants and research dollars by the research, teaching, and other committees?

Do the University policies support interdisciplinary work? The provost and the president may refer to it, the university publications may laud those who are doing creative and interesting things, however, what is the reality? What makes exciting writing in the alumni magazine is not necessarily in tune with the faculty evaluation system. What creates a vision of the future is not always supported in the details of the evaluation process. Does your university evaluation process value interdisciplinary work? Where is it in the annual Faculty Activity Report form? Where is it in the Deans, Department Chairs and other administrators' evaluation processes? If the Dean is not being evaluated on what he is doing for interdisciplinary education how likely are they to evaluate their chairs on interdisciplinary classes? Does the university's actions match all of the talk?

MANAGEMENT ISSUES

One of the problems that interdisciplinary programs and classes may suffer from is a confusing chain of command. Put shortly there may be too many bosses. Think about a case where you have two Deans, two department chairs, two assistants to Deans who schedule rooms, two student service people who develop class schedules, and perhaps a center director. In addition there are surely faculty committees for the program, a separate one for hiring, and perhaps a dean's executive council or two? This may mean that the program is under constant siege by one group or another. Dealing with all these groups just adds

to the time consumption of trying to offer these courses and programs.

This many bosses mean that not only are their many reports to be made, but there are lots of people making decisions that may change a class or program particularly in its fragile beginnings. Two of the common changes are, from team taught to adding a section that is not team taught. Courses treated in this way often lose their special characteristics rapidly. Once it has been done for one semester why not do it for more? Quickly a well designed interdisciplinary course becomes a one person course. Along with that usually goes the interdisciplinary nature. Secondly a department chair filling a slot may not explain to the new faculty, visitor, or adjunct, the vision of the course in the way those that have created the course or program would. If the department chair is not part of the vision it may not be possible. What is the department chair's incentive to be involved?

Scheduling is a large and important issue. Deans, department chairs, and those responsible for courses are not used to thinking about rooms across departments and across faculty. In a multi campuses university this can be a disaster if not watched carefully. People find themselves with inconvenient or impossible schedules because only one of the faculty members was on the class schedule list. Similarly special rooms are often needed for interdisciplinary classes and that fact often gets lost in the scheduling process.

Deans and chairs are frustrated by interdisciplinary programs because it limits the use of faculty resources. If a member of the Art, the Occupational Therapy and the Engineering faculties are teaching a course on deigning for aging, then there are three Deans, and three department chairs that are limited in how they can use faculty. It is not only that the department chair in art loses the course load, but also that chair can not move his faculty around in other courses, which may create issues in trying to schedule the sculpting studio. This is very complex, and most schools are not prepared administratively. They are not willing to make the changes to deliver what they are talking about.

There are other issues that university administrators face that make it easier to talk about interdisciplinary work then to actually support it once it is initiated. These courses are usually faculty intensive and often capped at lower enrollments. What does this do to the economics of teaching? If the average class size is 50 and this class is limited to 20 what does that do? Is the University or the college committed to the investment it takes to build it? There are at least two major issues here. First is the question of maintaining the average class size for the person who watches such things in the Provost Office.

Deans do not like to get the memos that ask why they are running undersized classes. Second, peer to peer teaching load equality. How does it look to other faculty who are struggling with larger student counts?

There are advocates who suggest these classes should be run with low enrollments so that the course can be developed. There is a great logic to this. It usually takes several rounds before an interdisciplinary course can be considered developed. Further, there are safety issues in some areas. If you are going to unleash students, tools, and faculty in a new environment can everyone be safe in a large class? The faculty member needs to develop a process for handling safety issues by experiencing the process. Equally there are those who say if the numbers are not there canceling it makes economic sense. What is the class size issue in your school? Have you thought about this in your program? Is the university committed to making an investment in the program?

When it comes to interdisciplinary work faculty are not interchangeable. These teams become close, they are sharing ideas, time, culture and grading. It is not easy to take one out and put another one in a course. It changes the whole dynamic. Teams do not play the same when they have new members. Actors have to adjust to new leads in the theater. Faculty members are not widgets. They are not interchangeable parts. Why is this concept hard for some to understand?

Most of all tying faculty into interdisciplinary courses reduces administrative flexibility. It creates a lot of extra work and meetings. It becomes a constraint on resources from classroom to staffing to student capacity.

WHY NOT KILL THE TALK?

Why even do any of this? Why attempt to break down the academic silos? Why encourage faculty innovations in teaching? Why encourage interdisciplinary work? It is a rich learning experience for students. Student's minds are challenged to new levels with faculty in the classroom from multiple disciplines. They learn that world is not fixed in one way but can be seen from different perspectives. All of this is worth doing.

What is needed is for administrators to walk the walk. How can they be helped to think about the system consequences and prepare for those? How can they see that junior faculty will be rewarded for their work in these areas as well? How can they make the system friendly to interdisciplinary work?

These are all issues that the authors have experienced at in the process of developing courses and programs across a

number of disciplines. It is hoped by raising some of the issues others may be able to reduce the pitfalls and increase the benefits for students and the learning process.

RELATED WORKS BY THE AUTHORS

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“Parallel Coursing,” *Marketing Management Associa-*

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Paul Lane
Entrepreneurship and Marketing
Grand Valley State University
401 Crest Drive
Holland, MI 49424–2272
Phone: 616.336.7470
E-Mail: lanepa@gvsu.edu

John Farris
Engineering
Grand Valley State University
401 Crest Drive
Holland, MI 49424–2272
Phone: 616.336.7267
E-Mail: farrisj@gvsu.edu

CASE COMPETITIONS: A VALUABLE PEDAGOGICAL TOOL

Robert F. Young, Northeastern University
Raymond Kinnunen, Northeastern University

ABSTRACT

For several years, business school students have participated in intercollegiate “case competitions.” In addition to school pride and team spirit, there are several very worthwhile intellectual and pedagogical outcomes of such activities. Under substantial time pressure, students learn the value of rigorous analysis, integration, and “sense making” of complicated business cases. They also receive substantial practice in both oral and written communications. Marketing teachers should recognize the unique pedagogical value of such competitions.

INTRODUCTION

For several years business school students, both undergraduate and MBA’s have been participating in case competitions. These events are a combination of intellectual exercise and sporting contests. Teams from various schools gather to present analyses of selected business cases before a panel of judges. The best presentations are then awarded a prize and “bragging rights” for their superior performance.

There are now several of these competitions. In January, 2005, Rice University sponsored a Marketing case competition for students from leading MBA programs. The Darden School of the University of Virginia holds an annual case competition for undergraduate students in Europe. Since 1997, the consulting firm of A.T. Kearney has held a “Global Case Competition” for students from ten of the leading MBA programs.

In the Boston area, there has been for many years an annual “Beanpot Case Competition.” Undergraduates from six of the top Boston area business schools compete annually for the “Beanpot.” to signify their victory in what has evolved into an intensive and well publicized event within the University community.

OVERALL PURPOSE

There are several overall purposes to these competitions. In the first place, they give business schools a “team,”

somewhat similar to athletic teams. Students become enthusiastic about the competitions and take great pride when their team wins. The competitions are also a forum to “show off” each school’s best students and the publicity has the potential to attract new applicants.

ADDITIONAL VALUE

In addition, there is a somewhat overlooked value to case competitions. They provide some of the schools’ outstanding students an additional course in analysis, strategy, and decision-making. As such, the competitions serve as an extra course in critical thinking. And, the thinking is not in a vacuum, for the students must make presentations and defend their analysis and solution before a panel of judges. They are forced to be rigorous and definitive. Thus, the classical goals of analysis and rhetoric are well satisfied. And, as informally reported in our university, students consider these experiences to be among the best “courses” they receive in their education.

Typically the competing schools make an effort to choose team members from among their outstanding students. With this high powered cohort there is a tremendous sense of competition. And, of importance, the student participants learn a great deal from each other. It becomes the best, teaching the best.

PURPOSE OF BUSINESS EDUCATION

To examine what the value is of these competitions we must first briefly summarize what the goals are of the top academic business degree programs.

To begin with, obviously business schools try to teach something about the functioning of businesses. But, that is not enough. As Alfred North Whitehead said almost a century ago, “A merely well-informed man is the most useless bore on earth” (Whitehead, p. 1). In speaking of professional education, he advocated the combining of knowledge with imagination. “Fools act on imagination without knowledge; pedants act on knowledge without imagination” (Whitehead, p. 140). And, it is this combining of knowledge and imagination that most business

programs are trying to impart. We want our students to use their knowledge and to synthesize imaginative and practical solutions to diverse business problems.

In addition, most business scholars will attest that no two business situations are exactly the same. Thus, we want students to develop their own unique method or “habit” of learning (Liang and Wang 2004). We want them to have certain generalizations in mind, but, also more importantly to be able to ascertain the uniqueness of each business opportunity or problem. And, thus we want them to know when and under what conditions certain techniques apply along with when and how “imagination” must be applied. And, of course, students must learn to blend the two approaches.

THE PROCESS

Most business schools participating in the case competitions have their teams go through several practice sessions. In these drills the students analyze and prepare cases in a format similar to the actual competition. Typically, the cases represent multidisciplinary challenges, with an emphasis on marketing issues. Questions such as what markets to serve, promotional policies, positioning, and foreign market entry are often portrayed. These marketing issues must be analyzed, understood, and the resultant recommendations woven in with the overall strategy of the firm.

It is in these practice sessions that much of the learning takes place. Students are often coached by one or more faculty and then present their analysis and recommendations to another set of faculty. It is during these sessions that professors demand critical thinking. They ask for specific evidence. They probe the contradictions in the recommendations. Students learn how to synthesize solutions from disparate evidence. They must move from generalizations to specifics. They must resolve seemingly irreconcilable contradictions in the data. And, importantly, they learn to present and to defend their analysis and recommendations.

As Nadkarni (2004) recently noted, often the most difficult part of decision making in business situations is not choice making, but, rather sense making. The student are under severe pressure to “make sense” of a complicated business case. Five or six very bright young people interact around the question of “what is going on here?” And, they do this with only a little time to reach a conclusion about the nature of the problem. Faculty involved in these practices relate that this is often the critical or defining activity for the team.

Typically, the teams are divided by functional specialty. One member takes responsibility for marketing issues,

another for financial issues, etc. Then, after each person has read and analyzed the case with attention to his or her particular specialty, the team meets to discuss problem diagnosis and eventual solutions. This process mirrors what often happens in industry. Functional specialists must contribute their particular insights. Then, they must work with the team to see how it fits into some coherent whole. In this process, the students learn how to advocate their position on the one hand, and, importantly, how to “back off” and see their team members viewpoints on the other hand.

Our many observations of student teams during their practices have led to several conclusions. First, with the tremendous pressure to resolve conflicts quickly, each student develops judgment about the relative importance of their own viewpoint. Next, through the many practices the students learn that they must come up with a concept of the case. Also, they come to realize that in order for them to craft worthwhile recommendations it is necessary to have in hand much more than separate analyses. In most of the situations a truly multi-functional answer must be crafted to “make sense” of the situation.

In this process of functional analysis another important learning often takes place. Soon after practices start, the team members learn about their colleagues differing strengths and weaknesses. Sometime the student who was perceived as an “expert” in a particular area turns out not to be. The other students must be flexible and pick up the slack. The team learns that the old proverb about the team being only as strong as its weakest link does not have to be true. As in so called real world business settings, others need to compensate for weak colleagues if the enterprise is to succeed. So often young managers’ careers are dependent on the performance of the task forces and small groups to which they are assigned. In case competitions all of the students learn that it is in fact the group which is “genius” and not themselves alone.

Most business schools today recognize the necessity of teaching integration. Students must come to understand the interaction of the various functions of the firm. Yet, there are few devices for accomplishing this. Most business programs have a capstone course in policy or overall corporate strategy. In some ways, participation in the case competition teaches the same intellectual content and skills as these courses. However, because the team has to look at all facets, it can not escape the difficult or untidy elements. For instance, during practice sessions the team members become well aware that if an acquisition is recommended the judges will be looking for intricate financial projections as well as a discussion of the impact on the organization’s culture. They learn that marketing strategies must make sense in light of not only customer trends, but also technological changes, resource con-

straints, and any legal or regulatory issues. They must pull all of these together into an integrated whole. Since the team must put together a 20 minute presentation, they must cut to the relevant issues. Yet, they can not ignore important trends and very importantly the interaction of all of the elements of the case.

LASTING VALUE

As in all educational endeavors faculty must ask “of what lasting value is this going to be?” Students have reported back after many years that the case competition was the most valuable element of their undergraduate career. The ability to diagnose and to synthesize solutions to problems has lasted. Long after particular formulas or lists are forgotten, the students report that what has been retained from their education is the methodology or way of thinking about complex business issues. It is the ability to take apart and examine a problem from many venues. It is the sensitivity to what is really important amongst many facts and analyses. It seems to be almost a sixth sense that has

been developed – the ability to ascertain “what is really going on here” and to forge practical multi-functional solutions to a problem. As a result of participating in case competitions, students learn these values and these paradigms under intense pressure. There is a high probability that they will remember them for a long time.

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Robert F. Young
College of Business
202 Hayden Hall
Northeastern University
Boston, MA 02115
Phone: 617.373.4564
FAX: 617.373.8366
E-Mail: r.young@neu.edu

Raymond Kinnunen
College of Business
202 Hayden Hall
Northeastern University
Boston, MA 02115
E-Mail: r.kinnunen@neu.edu

INTEGRATING LOCAL SMALL BUSINESSES INTO THE MARKETING STRATEGY CLASS

Nona Jones, Benedictine University

ABSTRACT

This paper provides a framework for making a local community an integral part of a university in a way that goes beyond the usual “guest speaker” or “company-visit” route. The framework is centered on groups of students establishing relationships with company owners/presidents early in the semester, working with those individuals throughout the semester as each group of students develops a comprehensive marketing plan for the company, and finally, submitting that plan to the owner/president in both oral and written formats. The paper describes techniques used to integrate the students’ “company projects” with material covered in a case-based, capstone marketing course – through real-time application of marketing concepts and real-time analysis of strategic marketing problems.

INTRODUCTION

It is probably the rare marketing instructor who would not acknowledge the need for, and value of, utilizing a variety of teaching methods. From their use of the long-revered lecture method to their introduction of technology into the classroom, marketing instructors continually strive to master their art to meet the expectations of both their students and their institutions. The characteristics that were identified in a 1988 study as differentiating highly effective teachers, for example, continued to be the differentiating characteristics in a similar study 15 years later (Smart, Kelley, and Conant (2003). This article focuses on two of these characteristics: a real-world perspective and an involvement orientation.

Authors of marketing textbooks, like *Essentials of Marketing*, by Perreault and McCarthy (2003), frequently use real-world examples to illustrate the application of marketing concepts. Taking the use of examples one step further, Perreault and McCarthy even package a compilation of recent clippings (*Applications in Basic Marketing*) from the popular business press with the textbook. But as invaluable as they are, by the time such textbooks and supplements are published, many of the examples are dated. As a result, students are reading about what *has* happened rather than what *is* happening. Some instructors, this writer included, in an attempt to rectify this

problem, introduce additional examples, ones that are more real-time, by using techniques like bringing in marketing practitioners as guest speakers; requiring the reading of, and reporting on, up-to-date articles from publications like *The Wall Street Journal*; and arranging for visits to companies so that students can hear from marketing practitioners in the practitioners’ environments. The introduction of these additional techniques does, undoubtedly, enhance the students’ experience; however, the techniques still do not address the previously mentioned involvement-orientation characteristic that differentiates master teachers.

Of course, by virtue of being a student, one is involved in the learning process. But a true involvement-orientation situation implies more of an action orientation on the part of the student. It could be argued that case-based marketing strategy courses do involve the student in an action-orientation manner. And, indeed, these courses are not just valuable, but also necessary. However, once again, with the cases in such courses, there is the problem of real-world situations being dated by the time they appear in textbooks, thus losing the real-time benefit. It could also be argued that the professor can, without too much effort, structure real-world, real-time cases from material appearing in publications like *The Wall Street Journal* and *Fortune*. But such projects still fall short of the ultimate goal of involving students in an action-orientation manner, because they do not give students the opportunity to analyze a situation, identify problems, and propose solutions that may actually be implemented by a company at some point.

The purpose of this article is to describe how a teaching technique used in a Marketing Strategy class can offer students a real-world, real-time, action-oriented experience to supplement the material normally covered in such a course, while at the same time, enhance the students’ understanding of a segment of the economy whose significance they may have overlooked: the small business. First discussing the need for marketing students to gain practical experience applying what they have learned, the article then examines the need for small businesses to engage in more planning, particularly with respect to marketing. With these two positions established, the case is made for a mutually beneficial interrelationship be-

tween marketing students and small businesses. The remainder of the article describes the experience of groups of students in the class with three small businesses in the immediate area of the small, private, liberal arts university the students attended at the time. The article concludes with an assessment of the project and suggestions for possible follow-up work with the small businesses.

MEETING MARKETING STUDENTS' NEED FOR PRACTICAL EXPERIENCE

Studies have been done to determine what characterizes the excellence that educators strive for, that is, which techniques tend to be employed by those teachers recognized as being excellent in their fields. Smart, Kelley, and Conant (2003), found that highly effective teachers of marketing acknowledged the importance of four general characteristics of excellent teachers—strong communication skills (enthusiasm, humor, voice projection), a real-world perspective (discussing current events, linking theory to practice), caring/empathy (listening, individual sensitivity), and an involvement orientation (requiring students to participate in the learning process). Of these four, a real-world perspective and an involvement orientation are the two that most closely relate to practical experience. Although the method most frequently used to get students involved was the asking of questions, the authors found that proportionately more comments of study participants in the later study addressed the discussion of current events than in the previous study. They attributed this increase in large part to the extreme volatility and uncertainty of today's global business environment. The combination of a real-world perspective and a discussion of current events is simply another take on the real-world, real-time focus discussed earlier in this paper. (Of course, what constitutes "current" may vary by instructor.) However, neither asking students questions nor engaging them in discussions of current events gets them involved to the extent they need to be if they are to be prepared to help firms meet the challenges they face in today's environment.

Since marketing skills, like any other skills, are best learned through practice, students need practice applying what they have learned in the classroom. Marketing educators are fully aware of this fact. They realize that having learned marketing concepts, students then need the opportunity to apply these concepts to both the structuring and the solving of real-world problems. Because employers require employees who can help their organizations meet increasing challenges and take advantage of opportunities, it is critical that students be able to demonstrate that they can bring value to these organizations. Ackerman, Gross, and Perner (2003) emphasize that students preparing for careers in the uncertain markets of today's business environment must learn to engage in

critical thinking about the future of businesses. According to Chaffe, critical thinking involves "carefully exploring the thinking process to clarify our understanding and make more intelligent decisions" (Chaffe, 2006, p. 47). The author further defines the critical thinking process as being composed of the following components: carefully exploring situations with questions, thinking independently, viewing situations from different perspectives, supporting diverse perspectives with reasons and evidence, thinking actively, analyzing issues and discussing ideas in an organized way. Such thinking on the part of marketing students, Ackerman, Gross, and Perner maintain, would require that they be able to critically analyze the position of a firm and envision where future value can be created for customers. Thus, the study on which their article is based focused on the need to develop students' capacities to analyze future-oriented issues, identify future problems and opportunities, and devise solutions that will help create new value for customers, and as a result, help businesses take advantage of opportunities. The point that is emphasized by the authors is the need for marketing students to develop a propensity for proactive response to change. And the way to develop this tendency, Ackerman, Gross, and Perner maintain, is through coursework requiring the higher-level learning associated with critical thinking—application, analysis, synthesis, and evaluation. By structuring courses to emphasize critical thinking, then, marketing educators help today's students meet the requirements of firms that look to business schools to provide graduates who possess the insights and critical thinking necessary for success in a changing business landscape. According to the authors, these firms have not always been satisfied.

The Use and Usefulness of the Case Study

Perhaps the most frequently used method of giving students practice in analyzing, synthesizing, and evaluating is the case study. Case studies that describe problems firms have faced in the past give student an opportunity to practice learned concepts and employ specific tools to develop strategies based on the situations presented. Barnes, Christensen, and Hansen (1994) describe the use of case studies as "discussion teaching," and note that such teaching, in addition to giving students first-hand appreciation of, and experience with, the application of knowledge to practice, puts them in an active learning mode. This active mode, they maintain, challenges students to accept substantial responsibility for their own education.

Cases can also be of benefit to underclassmen taking introductory marketing courses. In their textbook *Essentials of Marketing* for example, Perreault and McCarthy (2003) include a variety of smaller, more focused cases to illustrate how companies handle topics covered in each

chapter. Their purpose, the authors state, is to provide a basis for critical evaluation and discussion. Perreault and McCarthy even provide relevant Internet addresses to make it easy for students to quickly get updated information about the companies and topics covered in the cases. Despite their usefulness, however, there are limitations to cases, the primary one being the issue of timeliness; by the time cases are published, they are already dated. As mentioned previously, marketing educators have devised ways to overcome such limitations associated with information being outdated. The following section will argue the need to maximize the benefits of using the case study, with the goal of better preparing students for the marketplace.

Beyond the Traditional Case Study

Citing studies showing that employers have found business graduates lacking tolerance for ambiguity and critical thinking skills, Ackerman, Gross, and Perner (April 2003) surveyed instructors, employers, and students to assess the value of different teaching methods. What they found was that the most frequently mentioned method of involving students in critical thinking was the use of the marketing plan, which of necessity centers on future events. The authors further maintained, however, that even with the SWOT analysis, a critical component of a marketing plan, students may tend to emphasize the strengths and weaknesses rather than the opportunities and threats, thus taking focus away from the recognition and evaluation of new possibilities, that is, away from the future of a firm. This suggests that marketing educators can take students beyond the traditional case analysis by directing them to focus primarily on identifying opportunities. Such a focus would, in and of itself, be more action oriented, as students would also need to devise ways that a firm could take advantage of such opportunities. Thus, implementation becomes the goal.

Implementation was the subject of an article by Pascoe (1992) who questioned what had happened to the execution of plans. He examined problems managers experienced in implementing marketing strategies and then asked what marketing educators should teach to help their students implement their knowledge in practical marketing situations and how they should go about it. What he recommended was that marketing educators use action-learning projects that go beyond the kinds of projects that are included in conventional, course-work marketing programs. With such a project, a student group actually implements the solution it proposes and then evaluates its implementation effort. It should be recognized that this type of project might require a longer-term commitment than would be possible in most quarter or semester courses, but Pascoe's recommendation certainly underscores what

needs to be done to adequately prepare students for careers in marketing.

Execution was also Lessin's (1995) focus in commenting on the way both marketing and entrepreneurship are taught. This author indicated that when the Allan P. Kirby Center's entrepreneurship teaching program was launched, it was decided that experiential and real-time case histories would be used. Publications such as *Marketing News*, the *Wall Street Journal*, *Entrepreneur*, *Barron's*, *Fortune*, and *Inc.* were used as primary source materials, with texts serving as secondary sources. With this approach, in addition to gaining a grasp of what it takes to move a product or service, and learning about entrepreneurship in general, students also learn a considerable amount about "what makes entrepreneurs tick" (Lessin, p. 11).

SMALL BUSINESSES' NEED FOR MORE MARKETING

According to the Small Business Act, a small business concern is one that is independently owned and operated and which is not dominant in its field of operation. With respect to size, the Small Business Administration (SBA) generally considers any business with fewer than 500 employees, including self-employed individuals, to be a small business (www.sba.gov). Just as undergraduate students have a need for practical experience, so do small businesses have a need for marketing expertise. This need is evident considering the risk of failure that small businesses face. Although the failure rate of small businesses has been refuted with the argument that not all businesses that close are failures (www.dol.gov/odep/pubs), the fact still remains that a significant number of new businesses are no longer in operation after five years. So for purposes of this paper, the focus will be on the general risk of failure for small businesses.

A number of reasons are often cited for this failure, but perhaps the most frequently cited reason centers on the lack of adequate planning. Perry (July 2001) found a statistically strong relationship between written business plans and the failure of small businesses in the U.S. Although his study stopped short of inferring that a lack of a written business plan causes failure, Perry strongly suggested that planning could enhance a business's chances of survival and success. Monk (July/August 2000) maintained that the most significant reason for the high failure rate of small businesses is their failure to develop an initial plan or to continually adjust and use a plan as a benchmarking tool.

Freeman (2000) has made a more direct connection between the failures of small businesses and their lack of proper marketing. As a result of years working as a

consultant with small and medium enterprises (SMEs), Freeman found that small businesses feel they will benefit from a better understanding of marketing. The study on which her article was based showed that the most important factor in ensuring survival and growth was active market development and broadening of the customer base. Her recommendation for furthering this understanding by small businesses was to provide a forum where such businesses can bring their marketing problems and where business undergraduates can bring their current knowledge and expertise to solve these problems. This was the action-based research approach she used to test the underlying concepts of need from both the small business owner/manager's viewpoint and that of the business undergraduate. She suggests that the more that graduates are exposed to small business marketing problems and find them equally as challenging as large business marketing problems, and the more that they can be seen by SMEs to be able to solve them, the narrower the gap will be between their relative understanding of each other. She also makes another interesting point regarding the expanding interest of large organizations in the concept of intrapreneurship, that is, a new business venture within an established larger company. If students have experience operating in a marketing/entrepreneurial way, they will have little difficulty, if any, responding to the challenges of intrapreneurship.

Since small businesses have a need that undergraduate marketing students can help meet, and marketing students have a need that small businesses can meet, it seems logical to bring the two parties together. The experience can be of even more benefit to students by helping them become aware of some of the unique problems small businesses face. In addition, with respect to their thoughts of employment possibilities, it is probably safe to assume that a majority of business students, especially those nearing graduation, are attracted to larger businesses. After all, for the most part, it is the large businesses that recruit on college campuses. Working with small businesses, therefore, can expose students to employment possibilities they may have never considered, especially now with much of the growth in employment taking place in small businesses. As stated on the Small Business Administration Web site, "small businesses are the engine for economic growth in America and represent a powerful vehicle for opportunity" (www.sba.gov). The site further reports that small businesses provide approximately 75 percent of the net new jobs added to the economy and represent 99.7 percent of all employers. In addition, it is stated that small businesses hire a larger proportion of employees who are younger workers, older workers, and part-time workers. These statistics help explain the increasing interest in sustaining small businesses. Freeman notes that economists, government agencies, academics, and industry bodies alike want to be involved in develop-

ing practices that will help ensure that the small business sector flourishes. Citing this increased interest in, and importance of, sustainable small business, as well as a move away from the traditional graduate recruitment route into well-established large businesses, Freeman investigated the premise that small businesses need marketing expertise in order to grow and that undergraduates need more experience of studying small business marketing problems. The conclusion she reached was that developing small business consultancy/case studies around specific marketing problems develops new teaching materials, provides the forum for interaction between SME owner/managers and business undergraduates, and helps change existing perceptions.

The following section of this paper describes a project engaged in by a case-based Marketing Strategy class utilizing small businesses in the vicinity of the university the students attended. Although the process described was not designed initially for the purpose of developing case studies, the students' work with the companies does, in effect, constitute real-time case analyses. In fact, to a certain extent, their work went beyond case analyses to include the beginning of implementation of a plan.

A PROJECT FOR AN ACTION-ORIENTED MARKETING STRATEGY COURSE

In the Marketing Strategy course at Benedictine University, case studies are used to evaluate marketing strategy. While focusing on major topics in strategic marketing, the components of a marketing plan, and financial analysis for marketing management, the cases provide students an opportunity to apply marketing concepts and practices and to analyze strategic marketing problems in a wide variety of industry settings. In addition to class discussions of selected cases, groups of four to five students each are assigned cases (two cases per group per semester) to present to the rest of the class. Each student is also responsible for submitting a written analysis of a case, and one of the exams is in the form of an in-class case analysis. The students, therefore, have ample opportunity to hone and demonstrate their analytical skills. Nevertheless, believing that they needed more real experience, this professor designed a project to afford students the opportunity to put their knowledge to real-time use.

METHODOLOGY

Approximately two weeks before the start of the semester, the professor contacted the president of one of the local Chambers of Commerce to explain the purpose of the project and to obtain the names and phone numbers of chamber members who he believed would be interested in participating in the project. (More than the required three names were obtained to allow for refusals.) The owners/

presidents of the small businesses were then contacted by telephone, beginning with the company that the Chamber of Commerce believed would be most interested in the project. The professor also used some discretion in selecting companies that would be of most interest to the students. Once the participation of the company was confirmed, an initial meeting was arranged with each company owner/president to discuss the project in more detail and to give him or her the names of the students who would be developing the marketing plan for that company.

After the initial meetings with the company owner/presidents, the professor distributed business cards and other information about the companies to the students and explained that from that point forward, it would be the responsibility of the students to set up their group meetings with the owner/presidents of their assigned companies. To facilitate these meetings and to allow for the various work and class schedules, however, the professor did allocate three class times at various times in the semester for student-group meetings with the company presidents. The student groups were then responsible for giving updates at the class meeting following each visit and for relating their findings/analysis to topics discussed in class.

With respect to continuing contact with the owner/presidents, it could be argued that to minimize disruption to company operations, all correspondence should have been between the professor and the company. However, it was decided that for this project, the students themselves would be responsible for corresponding directly with the company owner/presidents. This decision was made in order to give students practice in managing their time; respecting the time constraints of others, especially small business owners; and making alternative plans when meetings could not be arranged. (Of course, the professor first got the owner/presidents to agree to this arrangement, and the professor contacted the owner/presidents periodically for updates from their perspective.) The students understood that there was to be only one point of contact for the firm. Therefore, each group was to select a leader who would serve in this contact role.

Three groups of students worked with three different companies: an authorized dealer for mobile phones and wireless services, a hair salon and day spa, and a direct mailing service company.

Company Descriptions

Founded in 2003 by a former employee of a Fortune 500 telecommunications provider, the wireless services dealership offers products and services including mobile phones, satellite services, wireless internet services, and

personal GPS locators. Some of the products are hard to find elsewhere. The company currently operates from a single location in a strip mall; however, the owner is considering expansion or relocation to a nearby town to improve visibility and accessibility. At this time, there are no additional employees and no plans to add any until the owner is able to grow his business to a more profitable level.

The owner of the hair salon and day spa has been in business for over 20 years and has an established clientele, some of whom have been with her for practically the entire 20 years. Products and services provided include facial treatments, day spa packages, hair care, body care treatments, nail care, body waxing, endermatherapie cellulite treatments, intense pulse light therapy, and microdermabrasion. Except for hair care, which is provided for women only, the facility serves both men and women. The hair salon and day spa is a single-building facility, easily accessible from a major four-lane street, just before the entrance to a toll road.

The direct mailing services company has been a business for over 15 years but was purchased by its current owners just four years ago. The company occupies a 6,800 square foot office and production space and employs five to ten employees, depending on the business workload. There has been a steady 10% to 15% increase in the workload every year since the current owners acquired the company. The company provides direct mail marketing services for small to large businesses of all kinds, with services including folding, tabbing, inserting, inkjet printing, labeling, list brokerage, mail merge, fulfillment of packaged items, and postal presorting. Orders range from small, 200-piece mailings to over 200,000-piece mailings.

Group Instructions and Procedures

The primary assignment of each group of students was to develop a comprehensive marketing plan and recommend a marketing strategy for the group's assigned company based on the current situation of the company and the objectives and goals of the owner/president. Therefore, for their initial meetings with the owner/presidents, students were instructed to obtain as much information as they could about the company and the industry using as a guide the marketing plan outline provided in their marketing strategy textbook. If required information was not available, the students were instructed to request the information from the owner/president, and if it was still not available, to independently research sources to obtain the information. Of course, the students were instructed to let the owner/president of the company know what they were doing. It is important to emphasize that the students were constantly reminded that they were, in essence,

serving as semi-consultants; due to their lack of experience and their need to also learn as much as they could from the owners, they were to be careful not to assume the position of know-it-all consultants. This point of guidance was in accordance with how the professor had proposed the project to the participating companies – as a mutually beneficial experience wherein the students and the owner/presidents would learn from each other. Therefore, in instructing the students, the professor continually reminded them that anything they might propose should be in the form of recommendations and should be done in a diplomatic manner.

The groups of students met with the owners of their assigned companies at the beginning of the third week of the semester. At this point in the semester, the professor had discussed with the class the fundamentals of strategic marketing management, specifically as it relates to the details of opportunity analysis, market segmentation, and market targeting. The professor stressed that the greatest benefit the students would probably bring to the owners of the companies would be in helping them identify opportunities and devise strategies for taking advantage of those opportunities. At the next meeting of the class, each group then informally presented its assigned company's situation, including the goals of the owner/president. As each chapter in the textbook was covered and accompanying cases analyzed and discussed, students were instructed to look for ways that they could apply the current marketing topic of discussion to their assigned company's situation.

Because of the significant amount of extra work required to work with the companies, students were given time off from class on two additional occasions – during the sixth and the eleventh weeks of the semester – to either meet with their respective company owners or to work independently on the project. In addition, students were responsible on their own for setting up meetings with the owners and for informing the professor as to when these meetings were scheduled. The objective in proceeding this way was to help students obtain an appreciation for the amount of work small business owners have to do; having to work around the extremely busy schedules of the owners forced students to make numerous adjustments to their own schedules. This procedure emphasized to students that in the work world, getting the job done often requires flexibility.

Results: Students' Major Findings and Recommendations

The groups submitted their written marketing plans (one plan from each group) to the professor at the beginning of the fourteenth week of the semester. The professor then graded the plans and returned them to the students one week before the final reports were due to be submitted to

the company owners. (Each group was responsible for making any necessary corrections to its marketing plan and submitting the corrected plan to the company owners no later than the day of the scheduled final exam for the class and the end time of the exam period. (There was no final exam in the class.) The professor followed up with each owner to confirm delivery; failure by any group to submit a final, corrected plan to the owner would have resulted in a significant deduction in the group's final grade for the project.

In addition to the written plan, each group made an oral presentation to the company owner during a regularly scheduled class period, with one presentation scheduled during each of the last three class periods before final exam week. A brief summary of the student groups' recommendations for the three companies follows.

The Mobile Phone and Wireless Services Dealership. Based on its SWOT analysis of this company, the group assigned to it found one of its major weaknesses to be its location: In addition to suffering from poor visibility for the major street, the store is limited in the type of signage the owner can use due to community ordinances. Other weaknesses included the lack of a service center capable of handling device and service issues, insufficient funds necessary for expansion, and no defined plan for or vision of the future. The group identified major threats to be the unfamiliarity of older Americans with the products and services offered and the prohibitive cost of advertising. Although they identified some points of difference, including a wide selection of products and services, strong customer service, and exclusive products, the students recognized that the company would have to exploit these differences immediately in order to take advantage of the opportunities these differences presented.

Working from this analysis, the students recommended a strategy that included specifically targeting teenagers and their parents, with the message that when it comes to wireless products and services, "the difference is clear," and relocating or expanding operations to an area with greater visibility and less competition. As part of their recommendation that the company target teenagers and their parents, the students even developed a Web site that they believed had a more youthful appeal. In addition, the students calculated a breakeven point for sales at the recommended new location.

The Hair Salon and Day SPA. Because the owner of this establishment had been in business for over twenty years, one of the first comments she made to the professor during the initial telephone conversation was that she had tried almost everything in terms of marketing. However, she also stressed that she is always looking for new ways to grow her business, and for this reason, she would be more

than happy to be a part of the class project. Realizing that the types of companies many of the students would be working for upon graduation would, indeed, be established ones, some of whose current managers would also be of the opinion that they had “tried everything before,” the professor decided the hair salon and day spa would be a perfect candidate for the project. The entire class would be able to benefit from making comparisons between the recommended strategies and required actions of this kind of company and a relatively new one like the wireless company. And, indeed, the group of students assigned to the hair salon and day spa struggled to discover new ideas that they could bring to the owner. When their struggles were brought before the rest of the class, the professor asked probing questions and invited the other students to do the same. After further discussion and group meetings, the students finally decided to focus on the owner’s goal of growing the business 20% over the next two to three years. They recommended that the owner plan to achieve a large portion of this growth in the male market. To reach this market, they recommended that the owner concentrate on more nontraditional promotional tactics such as sponsorship of golf tournaments. All of the students in the group were aware that more and more companies are resorting to such tactics, as this was a major topic of discussion in the Promotional Strategies that they had completed in the preceding semester. Following up on their golf-outing sponsorship recommendation, the students identified specific local golf courses that would be hosting tournaments and outlined specific promotional plans for the hair salon and day spa owner to follow.

The Direct Mailing Services Company. In their discussions with the owner of this company, the group learned that his primary goals were to increase the profitability of the company by 7 percent a year, obtain a 15 percent return on investment in new machinery by 2010, and build the brand image of the company in other target market areas. Their analysis of the company’s current situation revealed that the company’s core competencies were offering one-on-one consultations with interested customers and maintaining intimate relationships with customers, essentially through networking. The owner has a high position on the local Lead Town Committee and is able to promote his business through the relationships he has established with other members, who own private small and large businesses. With this information in hand – the company’s goals combined with its core competencies – the group recommended the following strategy:

1. Promote the free consultations on the company’s direct mailing cards and through other promotional activities. This action, they felt, would help the company translate its core competencies into a sustainable competitive advantage.
2. Redesign the brochure, mailing card, Website, and business card to convey a unified, integrated image.

The group felt that in their present forms, these promotional pieces did not clearly state the message the company needed to send, especially to potential customers.

3. Introduce on the Website the use of a Business Rate Calculator and the capability of the consumer to post projects for review. The group felt that this action would cut down on the time spent reviewing each customer’s account and increase productivity for both the company and its customers. In addition, they believed that this feature would allow the consumer, who might be unaware of the services the company offered, to decide if it could meet their needs.
4. Advertise in the local newspapers in the areas in which the company wants to expand.
5. Pursue its plans to update machine technologies, which would enable the company to provide services to a larger customer base.

Results: Reactions from the Company Presidents

The owner/presidents commented that they were very much impressed with the professionalism of the students in terms of both their oral presentation and the written report. The owner of the direct mailing services company, for example, was so impressed with the idea of a unified theme for his promotional materials, and with the actual design and finished product that the students had developed, that he is planning to have the materials mass produced just as they are. He has also indicated that he plans to follow the students’ recommendations regarding the handling of his expansion plan, and that he would like a future class to do follow-up work in the form of evaluating the success of that plan.

The owner of the mobile phone and wireless services dealership indicated that the students’ analysis and recommendations served to convince him to proceed with some strategies that he had only been considering. In addition, he was appreciative of the new Website they developed, as he believed that it would be more appealing to the kinds of customers he needed to attract. His only concern had to do with how he would approach this subject with the person who developed his current Website and who periodically assists him. The owner was also appreciative of the portion of the students’ analysis that focused on calculating the volume of business he would need to do to break even if he expands his operation.

The owner of the hair salon and day spa, though quite generous with her favorable comments regarding the students’ analysis and recommendations, did not seem to gain as much from the project as did the other two owners. Some of this lessened enthusiasm may well have been due to her inability to attend the oral presentation. The fact that she has been in business for over twenty years, however,

is probably more of an explanation. Nevertheless, she did show a special interest in the sponsorship of golf tournaments that the students' had recommended. In addition, to show her appreciation for the professional level of work that the students did, she gave them each a complimentary cut/trim.

SUMMARY AND CONCLUSIONS

The primary purpose of this project was to give students the opportunity to engage in a real-world, real-time experience. Therefore, assessment of the value of the project should be made in terms of benefits the students gained. Due to the nature of the project, a simple "What did you learn from this experience" kind of question at the end of the semester did not seem sufficient. Rather, the professor made informal assessments at various times during the semester by observing the students' responses to specific situations, taking note of their impromptu comments, asking them pointed questions related to their assigned companies, and monitoring their progress through verbal reports from the company owners.

Overall, the students seemed to appreciate the opportunity afforded them. A commonly heard comment was, "It's a lot of work, and it's sometimes frustrating, but I'm learning a lot from it." The students seemed especially pleased to learn that the owners were actually going to use some of their ideas. In fact, the idea that they, as students, were able to do something that a business owner believed might benefit him or her seemed to mean just as much to the students as did their project grades.

From the professor's perspective, the project reinforced the value of having students work with practitioners. While the work with owners of small companies might be criticized as not being where the "real action" is, this project showed that such an experience does give students a chance to feel as if they can make a difference, a feeling that can sometimes be lost in a large company environment. The experience also served to bring the concept of "teamwork" to a higher level. With this project, if a team did not pull together, not only would their grades suffer, but they would also be looked upon unfavorably by the owner of the company.

The most meaningful assessment of the project's value, however, would probably best be made in two ways: (1) by following up with students after they graduate and have worked for a year or two, and (2) by measuring results after the companies have implemented the students' recommended plans. It would be most beneficial if the students who recommended the plans could be the ones to

implement those plans. But because most of these students have graduated, it will be left to the professor to designate future classes to measure results. Even without any formal assessment, however, the project at least gave the students another taste of the real world and served as an excellent supplement to normal classroom activity.

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Nona Jones
Business and Management
Benedictine University
5700 College Road, Scholl-166
Lisle, IL 60532
Phone: 630.829.6475
E-Mail: NJones@ben.edu

DETERMINING RETURN ON INVESTMENT (ROI) FOR MARKETING TRAINING PROGRAMS

James R. Maxwell, Indiana State University

ABSTRACT

Return on investment (ROI) is an important marketing training outcome. The purpose of this paper is to learn how to calculate ROI through a cost-benefit analysis for marketing training programs.

INTRODUCTION

Cost-benefit analysis in this situation is the process of determining the economic benefits of a marketing training program using accounting methods that look at marketing training costs and benefits.

Marketing training cost information is important for several reasons:¹

1. To understand total expenditures for marketing training, including direct and indirect costs.
2. To compare the costs of alternative marketing training programs.
3. To evaluate the proportion of money spent on marketing training development, administration, and evaluation as well as to compare monies spent on marketing training for different groups of employees (exempt versus nonexempt, for example).
4. To control costs.

The process of determining ROI begins with an understanding of the objectives of the marketing training program.² Plans are developed for collecting data related to measuring these objectives. The next step is to isolate, if possible, the effects of marketing training from other factors that might influence the data. Last, the data are converted to a monetary value and ROI is calculated. Choosing evaluation outcomes and designing an evaluation that helps isolate the effects of marketing training. The remainder of this paper discusses how to determine costs and benefits and provides examples of marketing cost-benefit analysis and ROI calculations.

DETERMINING COSTS

One method for comparing costs of alternative marketing training programs is the resource requirements model.³ The resource requirements model compares equipment,

facilities, personnel, and materials costs across different stages of the marketing training process (needs assessment, development, marketing training design, implementation, and evaluation). Use of the resource requirements model can help determine overall differences in costs among marketing training programs. Also, costs incurred at different stages of the marketing training process can be compared across programs.

Accounting can also be used to calculate costs.⁴ Seven categories related to the cost sources are calculated. These costs include those related to program development or purchase, instructional materials for marketing trainers and marketing trainees, equipment and hardware, facilities, travel and lodging, and salary of marketing trainer and support staff as well as the cost of lost productivity while marketing trainees attend the program (or cost of temporary employees who replace the marketing trainees while they are at marketing training). This method also identifies when the costs are incurred. One-time costs include those related to needs assessment and program development. Costs per offering relate to marketing training site rental fees, marketing trainer salaries, and other costs that are realized every time the program is offered. Costs per marketing trainee include meals, materials, and lost productivity or expenses incurred to replace the marketing trainees while they attend marketing training.

DETERMINING BENEFITS

To identify the potential benefits of marketing training, the company must review the original reasons that the marketing training was conducted. For example, marketing training may have been conducted to increase productivity, sales revenue, economic profit, and increase the number of repeat customers. A number of methods may be helpful in identifying the benefits of marketing training:

1. Technical, academic, and practitioner literature summarizes the benefits that have been shown to relate to a specific marketing training program.
2. Pilot marketing training programs assess the benefits from a small group of marketing trainees before a company commits more resources.
3. Observance of successful marketing job performers helps a company determine what successful job per-

formers do differently than unsuccessful marketing job performers.⁵

4. Marketing trainees and their managers provide estimates of marketing training benefits.

For example, a marketing training and development consultant at a large computer hardware manufacturer was concerned with the quality and consistency of the marketing training programs used in sales operations.⁶ The marketing development consultant wanted to show that marketing training was not only effective but also resulted in financial benefits. To do this, the consultant chose an evaluation design that involved two separately marketing trained groups consisting of 27 employees and two untrained marketing groups (comparison groups). The consultant collected a pre-marketing training history of what was happening in the various sales divisions in each outcome the marketing development consultant was measuring (productivity, quality, revenue, economic profit, and labor efficiency). The consultant determined the effectiveness of marketing training by comparing performance between the comparison and marketing training groups for two months after marketing training. The consultant was able to show that the untrained marketing comparison group had 19% less revenue earned and 23% economic profit earned than the trained marketing group did. This finding meant that the trained marketing employees better sales and profitability and shipped more products to customers definitively that marketing training was contributing to computer hardware manufacturers business objectives.

To conduct a cost-benefit analysis, the consultant had each employee in the marketing training group estimate the effect of behavior change on a specific business measure (e.g., breaking down tasks will improve productivity or efficiency). The marketing trainees assigned a confidence percentage to the estimates. To get a cost-benefit estimate for each group of marketing trainees, the consultant multiplied the monthly cost-benefit by the confidence level and divided by the number of trainees. For example, one group of 20 marketing trainees estimated a total overall monthly cost benefit of \$336,000 related to marketing/sales increases and showed an average 70 percent confidence level with that estimate. Seventy percent multiplied by \$336,000 gave a cost-benefit of \$235,200. This number was divided by 20 (\$23 5,200/20 marketing trainees) to give an average estimated cost benefit for the 20 trainees (\$11,760). To calculate return on investment, follow these steps:⁷

1. Identify outcomes.
2. Place a value on the outcomes.
3. Determine the change in performance after eliminating other potential influences on training results.
4. Obtain an annual amount of benefits (marketing operation results) from training by comparing results

after marketing training to results before marketing training (in dollars).

5. Determine the marketing training costs (direct costs + indirect costs + development costs + overhead costs + compensation for marketing trainees).
6. Calculate the total savings by subtracting the marketing training costs from benefits (operational results).
7. Calculate the ROI by dividing benefits (operational results) by costs. The ROI gives an estimate of the dollar return expected from each dollar invested in training.

EXAMPLE OF A MARKETING COST-BENEFIT ANALYSIS

A cost-benefit analysis is best explained by an example.⁸ A large multi-national firm that produces electrical distribution and control products used in the utility, industrial, commercial, and residential markets. The organization employed in one country location employed 300 sales personnel with 48 area sales managers, 7 regional sales managers and a host country sales and marketing manager. The firm had three problems. First, 2 percent of the sales quotations produced each day were rejected because of poor quality such as insufficient competitive information. Second the sales area was experiencing poor housekeeping, such as high absenteeism and poor data storage and retrieval.

Third, the number of quote failures was higher than the industry average. To correct these problems, the sales managers, area sales managers, and regional sales managers attended marketing training in (1) performance marketing management and interpersonal skills related to quality problems and poor work habits of employees and (2) rewarding employees for performance improvement. Marketing training was conducted in a hotel close to the plant. The marketing training program was a purchased videotape, and the instructor for the program was a consultant. Table 1 shows each type of cost and how it was determined.

The benefits of the marketing training were identified by considering the objectives of the marketing training program and the type of outcomes the program was to influence. These outcomes included the rate of sales orders, revenue and economic profit, quality of panels, housekeeping, and accident rate. Table 2 shows how the benefits of the program were calculated.

Once the costs and benefits of the program are determined, ROI is calculated by dividing return or benefits by costs. In our example, ROI was 6.7. That is, every dollar invested in the program returned approximately seven dollars in benefits. How do you determine if the ROI is acceptable? One way is for marketing managers and

TABLE 1
Determining Costs for a Cost-Benefit Analysis

Direct Costs	
Instructor	\$1,500
In-house instructor (12 days @ \$125 per day)	
Travel expenses	375
Materials (\$60 x 56 trainees)	3360
Classroom space and audiovisual equipment (12 days @ \$50 per day)	600
Refreshments (\$4 per day x 3 days x 56 trainees)	672
Total direct costs	\$6,507
Indirect Costs	
Training marketing management	
Clerical and administrative salaries	750
Fringe benefits (25% of salary)	187
Postage, shipping, and telephone	
Pre- and marketing post-training learning materials (\$4 x 56 trainees)	224
Total indirect costs	1,161
Development Costs	
Fee for program purchase	3,600
Instructor training	
Registration fee	1,400
Travel and lodging	975
Salary	625
Benefits (25% of salary)	156
Total development costs	6,756
Overhead Costs	
General organizational support, top management time (10% of direct, indirect, and development costs)	1,443
Total overhead costs	1,443
Compensation for Trainees	
Trainees' salaries and benefits (based on time away from job)	16,969
Total training costs	32,836
Cost per trainee (32836/56)	587

marketing trainers to agree on what level of ROI is acceptable. Another method is to use the ROI that other companies obtain from similar types of training. Table 3 provides examples of ROI obtained from several types of marketing training programs.

OTHER METHODS FOR COST-BENEFIT ANALYSIS

Other, more sophisticated, methods are available for determining the dollar value of marketing training. For

example, utility analysis is a cost-benefit analysis method that involves assessing the dollar value of marketing training based on estimates of the difference in job performance between trained and untrained marketing employees, the number of individuals trained, the length of time a marketing training program is expected to influence performance, and the variability in job performance in the untrained group of marketing employees.⁹ Utility analysis requires the use of a pretest/posttest design with a comparison group to obtain an estimate of the difference in job performance for trained versus untrained marketing em-

TABLE 2
Determining Benefits for a Cost-Benefit-Analysis

Operational Results Area	How Measured	Results before Training	Results after Training	Differences (+ or -)	Expressed in Dollars
Numbers of quotations	Percentage rejected	2 percent rejected – 1,440 quotes per day	1.5 percent rejected – 1,080 quotes per day	.5 percent – 360 quotes year	\$720 per day, \$172,800 per year
Housekeeping inspection	Visual (average) using 20-item checklist	10 defects (average)	2 defects	8 defects	Not measurable in \$
Preventable Sales losses	Number of orders Direct cost of sales	24 per year \$144,000 per year	16 per year \$96,000 per year	8 per year \$48,000 per year	\$48,000 per year

ROI = Return/Investment = Operational results/marketing training costs = \$220,800/\$32,836 = 6.7
Total savings: \$187,964

Source: Adapted from D.G. Robinson and J. Robinson, "Training for Impact," *Training and Development Journal* (August 1989): 30–42.

TABLE 3
Example of Return on Investment

Industry	Training Program	ROI
Bottling company	Workshops on marketing managers roles	15:1
Large commercial bank	Sales training	21:1
Electric and gas utility	Behavior modification	5:1
Oil Company	Customer service	4.8:1
Health maintenance organization	Team Training	13.7:1

Source: Based on J.J. Philips, "ROI: The Search for Best Practices," *Training and Development* (February 1996), 45.

ployees. Other types of economic analyses evaluate marketing training as it benefits the firm or the government using direct and indirect marketing training costs, government incentives paid for marketing training, wage increases received by marketing trainees as a result of completion of training, tax rates, and discount rates.¹⁰

PRACTICAL CONSIDERATIONS IN DETERMINING RETURN ON INVESTMENT

ROI analysis may not be appropriate for all marketing training programs. Marketing training programs best suited for ROI analysis have clearly identified outcomes, are not

a one-time events, are highly visible in the company, are strategically focused, and have effects that can be isolated.¹¹ In the examples of ROI analysis in this paper, the outcomes were very measurable. That is, it was easy to see changes in increases in sales revenue due to marketing training. For marketing training programs that focus on soft outcomes (e.g., attitudes, interpersonal skills), it may be more difficult to estimate the value.

Showing the link between marketing training and market share gain or other higher level strategic business outcomes can be very problematic. These outcomes can be influenced by too many other factors not directly related to marketing training (or even under the control of the business), such as competitors' performance and economic upswings and downturns. Business units may not be collecting the data needed to identify the ROI of marketing training programs on individual performance. Also, the measurement of marketing training can often be very expensive. Verizon Communications employs 240,000 employees. The company estimates that it spends approximately \$5,000 for an ROI study. Given the large number of marketing training programs the company offers, it is too expensive to conduct an ROI for each program.

Companies are finding that, despite these difficulties, the demand for measuring ROI is still high. As a result, companies are using creative ways to measure the costs and benefits of marketing training.¹² Prior to training, the senior managers who are financially accountable for the marketing training program are asked to identify their expectations regarding what the marketing training program should accomplish as well as a cost estimate of the current issue or problem. After training, the senior managers are asked whether their expectations were met, and they are encouraged to attach a monetary value to those met expectations. The ROE is used as an estimate in an ROI analysis. Many firms continue to conduct ROI analysis for marketing training programs and courses in which objective numbers are available (e.g., marketing and sales training) and in which the influence of marketing training can be better isolated (evaluation designs that have comparison groups and that collect pre-training and post-training outcomes).

Evaluation provides information used to determine marketing training effectiveness. Evaluation involves identifying the appropriate outcomes to measure. The outcomes used in evaluating marketing training programs include marketing trainees' satisfaction with the marketing training program, learning of knowledge or skills, use of knowledge and skills on the job, and results such as sales, productivity, or accident prevention. Evaluation may also involve comparing the costs of marketing training to the benefits received (return on investment). Outcomes used

in marketing training evaluation help to determine the degree to which the program resulted in both learning and transfer of marketing training. Evaluation also involves choosing the appropriate design to maximize the confidence that can be placed in the results. The design is based on a careful analysis of how to minimize threats to internal and external validity as well as the purpose, expertise, and other company and marketing training characteristics. The types of designs used for evaluation vary on the basis of whether they include pre-training and post-training measures of outcomes and a marketing training and a comparison group. In conclusion a good marketing evaluation requires thinking about the evaluation in advance of conducting the training program. Information from the needs assessment and specific and measurable learning objectives can help identify measurable outcomes that should be included in the evaluation design.

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James R. Maxwell
Indiana State University
TC219D – John Myers Technology Building
200 North Seventh Street
Terre Haute, IN 47809–9989
Phone: 812.237.3623
E-Mail: jmaxwell2@isugw.indstate.edu

WEB-BASED HYBRID FOCUS GROUP APPLICATIONS FOR CLASSROOM AND INDUSTRY

Rob Larson, Luther College

ABSTRACT

The use of the focus group interview as a qualitative research tool has long been a staple for marketing researchers. Related to this, marketing textbooks from Principles texts to those covering research applications devote considerable attention to the topic of the focus group. This paper describes a web-based focus group that is a hybrid of the tradition focus group and the newly emerged online focus group interview process. The comparative strengths of this form of the focus group in both the classroom as well as in non-academic application are considered.

INTRODUCTION

Marketing researchers and social scientists as well as researchers from other disciplines have long utilized a variety of applications of the focus group interview as a basic qualitative research tool. In recent years the use of the tool has grown to the level that it has become the principle and in many cases the sole qualitative method used in academic and non-academic research (Levy 1999). To expose students enrolled in a variety of marketing courses to this tool, marketing textbooks commonly devote considerable content space to the topic. Most of the content explains the application of the traditional face-to-face focus group interview.

Over the past decade new forms of the focus group interview have evolved and gained varying degrees of acceptance and use. Various forms of online web based focus group interview processes have been developed as the medium in which the interviews are conducted. These online forms present advantages and limitations when compared with traditional focus groups.

Evolving from these new forms is a hybrid electronic based face-to-face focus group interview structure.

This paper will explain this hybrid format and examine instructional applications of this format for the marketing classroom. As a way of providing context both the traditional and new forms of the focus group interview will be explained.

TRADITIONAL FOCUS GROUPS

The traditional focus group interview is used as a means to gauge the responses of participants to questions ranging from the effectiveness of advertising copy to reactions to new products to many other applications. The range of potential questions is extremely broad but the format is generally quite consistent. A small typically homogenous group of 6–12 individuals is assembled and collectively interviewed on a series of questions. Commonly, the sessions are recorded and/or viewed by the parties sponsoring the interview. Key is the role of the moderator whose job it is to facilitate comments, generate and control interaction, and to serve as a gatekeeper to assure a degree of balance in the level of participation.

From this interview, hopefully, will be the collection of data and reactions that will be useful in assessing the central question that is at the core of the session.

The broad application of this research tool stems from the relative low cost and the limited time required to complete the process that begins with the decision to conduct a focus and groups concludes with the analysis of the collected data.

Drawbacks to the traditional focus group include results being adversely affected by dominating participants, limits to participation as only one participant can contribute at a time, organizing raw data (all of the comments and discussion) from the session, and drawing out conclusions from participants without limited the ongoing open-ended nature of the interview.

NEW NON-TRADITIONAL FOCUS GROUPS

In part due to the availability of new technologies and affordability of these technologies; new formats have evolved for conducting a focus group interview. The most prominent are interviews conducted telephonically and conducted online.

In an online focus group interview participants are assembled via web based meeting software. Participants

may be drawn from very diverse locations as the only significant requirements are computer hardware and high-speed Internet access. Moderators conduct the interviews via live online discussions in which the communication is entered via a keyboard. Typically, the comments of a participant is noted in a fashion that allows others to make the connection between the various comments made by specific individuals but the actual identity of the participant is not necessarily known. The attribution of comments is tracked and specifically tied to the participant to allow analysis that correlates comments to the individuals' profiles.

Discussions online can be open-ended and can be displayed in the sequence of their being entered or can be organized in discussion strings that allow responses to be made to specific previous comments. Moderators can also direct specific questions to the group or to individual participants.

At the conclusion of the session a written record of all of the comments is generated. With some software applications comments can be sorted by individual or sub-cohort group.

Drawbacks to these non-traditional focus groups include limitations that stem from the inability of moderators to observe non-verbal communication cues and then respond to these cues with specific inquiries or follow-up questions. Additionally, participants are limited to the text that appears on a computer screen as the sole type of interaction with other participants. Other issues with this type of interview include controlling who is actually participating without having visual confirmation of who is at the computer and control of distractions that may exist at the site of the participants.

HYBRID FOCUS GROUP

In response to limitations that exist with the new non-traditional focus groups but the desire to take greater advantage of new technologies a hybrid form has developed. The hybrid form assembles participants in a computer lab type of setting. Each computer is networked and uses one of a number of commercially available group processing software programs similar to those of the pure on-line focus group format. Responses by the participants can be viewed on each computer's screen as well as projected for common viewing.

The hybrid focus group interview is conducted with a traditional moderator who presents questions as if the structure were a traditional focus group. Participants, however, respond electronically to the questions posed by the moderator. Responses may be made to the questions of the moderator or may be made in relation to a previous

response from another participant. In this setting the participants are exposed to the formal input of others as well as non-verbal cues and body language.

The moderator has a range of tools available for managing the interview. The moderator can respond to text input or to non-verbal cues as a means to gaining additional insight into the beliefs of the participants. With many of the software programs available the moderator has the capacity to specifically attribute responses to the individual posting a comment. This attribution may or may not be known to the other participants depending upon the choice of the moderator or technical limits of the software utilized. A permanent record of every comment is made. It is also possible to create a video recording of the interview and/or to have non-participants observe the focus group live.

A number of companies market the software used for this type of application. Two examples are Facilate.com by the company of the same name and Connect by Meetingworks Inc.

INDUSTRY APPLICATIONS

The hybrid focus group format presents some important comparative advantages over traditional or online focus group formats. In many ways this format captures the most attractive and effective elements of traditional and online formats.

Some of the key advantages of the hybrid format for industry application include:

1. Flexibility of group size. This format allows larger groups to be assembled without the compromising the individuals' capacity to participate. With the online tools simultaneous contributions may be made.
2. Broader participation. A common problem of even a carefully selected participant pool for a focus group is that interpersonal dynamics can result in one or more individuals either monopolizing the interview or influencing the comments of others by the way they present their positions. While an effective moderator can manage some of these situations they nonetheless can impact the results of a group.
3. Anonymity of participants. Having the participation done with no attribution of comments being made to other participants can open contributions to being more candid and open.
4. Complete collection of data. Typically a number of methods are used to record the data from a focus group. These can include a recorder or the facilitator taking notes as well as audio and videotaping. A powerful aspect of the online tool is that those analyzing the interview capture every comment in the sequence it was made and is available immediately

for use. Comments can also be organized by individual participant for analysis purposes.

5. Non-linear discussions. The discussion string nature of the online tools allows participants to ‘come back’ to a question or comment and respond after some time has passed giving the opportunity for further consideration and reflection on the question.
6. Poll for conclusions. Normally a focus group does not attempt to reach specific conclusions or consensus. The reasoning is that this closes what is intended to be an open discussion. Online tools give a wide range of gauging sentiment that are flexible such as rating a question on a sliding scale and the capacity to have this part of the process done anonymously.

Drawbacks of the hybrid format include:

1. Comfort with technology. Not everyone has comfort with the use of technology. This potentially can affect participation or skew the population of the sample for the focus group.
2. Changes in role of moderator. In some ways the moderator in a hybrid focus group has an easier task and in other ways the task has become more challenging. What is certain is that a moderator is required to perform differently in order to be successful in this format.
3. Passive engagement. In a traditional focus group a moderator can easily identify and engage a member of the group that is not participating. In an online setting this can be more difficult to recognize.
4. Limited interaction of participants. One of the distinguishing elements of the traditional focus group is the direct interaction participants have with each other. In some circumstances the online nature of the hybrid group will increase this interaction, however, the direct verbal interaction is absent.

TEACHING

Introducing students to the focus group interview as a qualitative research tool is a common part of the curriculum for a range of courses including Principles and Marketing Research courses and often Advertising courses as these fields heavily utilize the focus group as a research tool. As a tool the focus group lends itself to in-class demonstration or other hands-on learning settings than most other research tools. As a result, teaching or leading focus group exercises including setting up, conducting, and observing groups are frequently allocated class time in these courses.

In the courses I have used traditional or hybrid focus group demonstrations or simulations, which have been both Principles and Advertising courses, the interviews have considered product reactions and analysis, advertisement copy responses and issue analysis. Class sizes

have ranged from 15 to 30 students with the size of the focus group ranging from six to 30. Commonly, classes would engage in both traditional as well as hybrid forms as a means to form comparisons and to analyze comparative effectiveness.

The hybrid focus group interview can be a powerful format in an instructional setting and can leverage both time and learning outcomes.

1. Impact of time constraints minimized. Most class periods are around one hour in duration. The volume of online contributions generated from a class in a limited time setting is substantially greater when online technology is included. This increases the experience for the participants as each student has a greater opportunity for contributions. Additionally, there is more raw qualitative data for after session/class analysis.
2. Effective means for the current generation of students to communicate. Whether the emphasis is on qualitative research or engaging students in critical analysis and discussion, these students are really comfortable and adept at using a keyboard as a communication tool in lieu of verbal communication.
3. Analysis. The capacity of software to capture all of the responses by the participants and to easily organize and print copies of the data makes moving to the analysis steps easier and more efficient for both students and instructor.
4. Moderator practice. The pace of responses allows a meaningful moderator experience to take place in a shorter period of time. This allows more students to participate in this role in the time devoted to the topic.
5. In addition to applications in marketing related disciplines the hybrid focus group format can be a very effective way to stimulate and engage student discussion and analysis in other disciplines. The hybrid format along with the capacity to capture discussion data can (and has at our school) been used in human resources, communications, investments, entrepreneurship, social work, and secondary education.
6. Size flexibility. With traditional focus group size commonly being smaller than many class sizes there are limits as to how an in-class simulation can be structured and maximize the number of students actively engaged in the exercise. With the capacity of simultaneous participation in the hybrid format the number of students participating can be considerably larger.
7. Group management. In professionally structuring a focus group the organizer is able to select the population of the group after considering a number of factors and likely meeting with prospective participants in advance of inviting them to participate. Faculty are not afforded this luxury and will have a student composition that consists of students with a

range of personality types and often out of class relationships and familiarity with each other than contributes to groups with both very dominant and very passive participants. The hybrid format creates a more hospitable environment for those who are passive for reasons of personality or hesitation to express opinions in a particular group setting.

While the hybrid focus group interview can be a powerful format in an instructional setting it does have notable limitations. These include:

1. Available software and facilities. Technology budgets and lab facilities can be a limiting factor.
2. Classroom management. If comments are not attributable to specific students this creates a shield of anonymity that can be very tempting for students to misuse.
3. Decrease consideration other types of communication. The online portion of the focus group can easily take center stage to the exclusion of consideration of non-verbal/non-typed communication cues and verbal communication. While an effective moderator will recognize the need to include all types of inputs it is easy to get caught up in the technology and either exclude the other forms and/or to send the message that only the electronic responses are valuable.

CONCLUSION

The current crop of college students, as well as those coming to us in the foreseeable future, has been conditioned to communicate in ways unavailable to society even a few short years ago. Text messages, instant messenger, email, and voice mail are cornerstones of the communication alternatives used by this generation. In addition to being new cornerstones in how communication occurs these tools are more accessible to users than previous means of communication. Many scarcely remember a time where these alternatives were not available.

With the social and intellectual conditioning that comes from the broad, almost ubiquitous use of these communications tools comes a consumer (and student) that instinctively communicates differently that previous generations have.

The use of the focus group in both academic and industry application can take advantage of the experience and propensities of students/consumers combined with the

availability of new technologies to redefine how this qualitative research tool is practiced and taught. From an instructional perspective inclusion of the capabilities of a hybrid focus group in a curriculum creates exciting and powerful classroom opportunities.

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Rob Larson
Department of Economics and Business
Luther College
700 College Drive
Decorah, IA 52101-1045
Phone: 563.387.1568
E-Mail: larsro01@luther.edu

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