Marketing Plan Project Workbook

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SURREY

Contents

The first step to success in a major academic project is understanding what you need to do. This section of your workbook includes the instructions for your project, tools for understanding the task well, and tips for success.

It may seem tempting to skip this section and begin working on the project tasks. This can be a risky strategy – many students find they work hard on a project, only to find that they haven't satisfied the assignment requirements.

By investing time into understanding the tasks ahead of you, you will be prepared to create an effective plan and to meet the learning objectives of your project.

Let's begin.

PART I

PROJECT OVERVIEW

1. Assignment Guidelines

Learning Objectives

By the time you complete this section of the workbook, you will have

- Read the guidelines for your group project
- Demonstrated your understanding of the task by completing a short quiz

Why Analyze Assignment Guidelines?

Many students skim assignment guidelines quickly, eager to get started on the project work. Why spend additional time analyzing the assignment guidelines?

In order to do a task well, you need to understand what is being asked of you. This includes understanding the **purpose** of the assignment. Why are you doing this task? It also includes understanding the **content** of the assignment. What do you need to research and write? Lastly, it is important to understand the **format** of the assignment. How do you need to present your work?

Read the assignment guidelines below. At the end of the page, you will complete a brief quiz to determine how well you have understood your task. (**Hint:** You can use the arrow on the bottom right hand corner of the activity to view it in full screen mode).

INSTRUCTORS: ADD YOUR ASSIGNMENT GUIDELINES HERE

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2. Rubric

Learning Objectives

By the time you complete this section, you will have

- Identified the ways a rubric can help you achieve your goals in this assignment.
- Reviewed your project rubric.
- Noted key characteristics of success in this project based on your rubric.

What is a rubric?

When you receive many of your course assignments, you may also receive a copy of the rubric the instructor will use to grade your work. The rubric provides information on what criteria shape a highly successful assignment.

How to use rubrics

Your assignment instructions and rubric are two of your key tools throughout the process of completing the assignment. These provide an outline of the criteria that the instructor has set out for a successful assignment. There are two key times to use the rubric and assignment instructions:

1. Before you start writing: Unfortunately, time may be lost writing something that does not meet the key guidelines you must follow. To avoid this problem, take time to read both the assignment instructions and rubric *carefully* before beginning. Clarify any areas of confusion with your instructor.

2. After you have written a draft, but before you submit the assignment: At this point, grade your work according to the rubric. Think carefully and critically. Are there areas where you may not have met the criteria well? If so, edit your work accordingly, making the needed revisions before submitting the assignment.

The video below provides additional strategies for using rubrics. When you are finished the video, you will begin reviewing your assignment rubric, printed below the video on this page.

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INSTRUCTORS: ADD YOUR RUBRIC HERE

3. How to Be Successful

Learning Objectives

By the time you complete this section, you will have

- Reviewed lessons learned from previous students about project success
- Listed the keys to success that you want to personally remember

Tips for Success in this Project[1]

1. The quality of the group process correlates 100% with the quality of the group product. What does that mean – in order to grade the group process part of the assignment I review the discussion forums to see who is participating, how often and the quality of the participation. Without fail the groups that worked well with one another (e.g. careful planning, clearly assigning tasks and staying in touch, etc.) score much higher on the paper they submit.
2. Expect to visit the course site a minimum of 3 times a week during the group project. It's preferable to check in daily. Checking in means checking your discussion forum

1. **Section content from Lesley McCannell, MBA, faculty member in the school of business at Kwantlen Polytechnic University**

to see if anyone is waiting for a response from you.

3. Don’t wait to take action – be the one who initiates the discussion – when you look at the marking rubric you’ll see that I look for “initiating discussion and ideas” when I’m grading your participation.
4. Everyone has to read the entire assignment thoroughly to do your initial planning. The hardest part of this assignment is getting organized!
5. If you want high quality research you need to coordinate the research that people do. The most successful teams would meet early in the week, discuss the deliverable (e.g. have a chat), decide what specific research would be helpful, assign specific tasks to members and update each other mid-week. It didn’t seem to work as well when teams would say – “just go and see what you can find”. People would end up duplicating the work of others and that affects the quality of the research.
6. Have the discussion about “who will write each deliverable early”. Sometimes that discussion never took place and everyone would wait to see if someone else would volunteer.
7. Hitchhiking on your team members efforts is not tolerated. If a member is not performing address the situation early – ask them if they need help. If I notice that a team member is continually not contributing to the discussion and chats I will first contact them to see if something is preventing them from full participation. If they continue to not participate I will remove them from the team. If you plan to be a way for a few days you need to let your team know that.

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PART II

WEEKLY TASKS AND TOOLS

4. Task 1: Analyze the Assignment

Learning Objectives

By the time you complete this task, you will have:

- Applied a systematic approach to analyzing your assignment
- Identified key challenges that you complete to be successful in your task

How to Analyze Your Assignment

Strategies and Steps to Achieve Success
You need a clear understanding of what the instructor wants before starting on any assignment of project. Then you will want to translate assignment terms and requirements into useful clues as to what your instructor expects. When you are not sure – always ask the instructor! The first step is to read the assignment carefully as soon as you receive it.
Interpreting the Assignment

Ask yourself a few basic questions as you read and jot down the answers on the assignment sheet:

- Why did your instructor ask you to do this particular task?
- Who is your audience?
- What kind of evidence do you need to support your ideas?
- What kind of writing style is acceptable?
- What are the absolute rules for the project?

Understand Key Terms

The following words might be found in your assignment. What do they mean?

- Identification Terms: cite, define, enumerate, give, identify, indicate, list, mention, name, state.
- Description Terms: describe, discuss, review, summarize, diagram, illustrate, sketch, develop, outline, trace.
- Relation Terms: analyze, compare, contrast, differentiate, distinguish, relate.
- Demonstration Terms: demonstrate, explain why, justify, prove, show, support.
- Evaluation Terms: assess, comment, criticize, evaluate, interpret, propose.

Unfamiliar terms need clarification

Begin with Background Content

Most assignment will be related to the materials you have studied in the course up to the point of the assignment. As you read the assignment or project requirements, start by identifying which theories, formulas, and graphics relate. Consider what research you will need to do to complete the project.

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5. Task 2: Develop a Group Charter

Learning Objectives

By the time you complete this task, you will have:

- Developed a team charter to guide your work together
- Created a table outlining your project plan
- Collected contact information for your fellow group members

Becoming a Team

A Team is two or more people; working together; on a Common Goal (or goals). Groups become Teams if the common goals are clear and attention is paid to both interpersonal and task functions.

The Team must Decide how to Communicate Effectively (Interpersonal)

Each Team must set up their own guidelines for good communication and a Team Charter. Through discussion and negotiation the members choose the items that are most important for their clear communication as a Team. These often include commitment to:

- Respect and Listen to others
- Not blame (work hard on the problem, not on the person)
- Group members and Project process
- Supportive and Constructive Feedback
- Agreed upon Goals and Clear Timelines
- Positive interdependence (sink or swim together)
- Individual Accountability (say what you will do and do it)
- Analysis of work done and Planning for next steps
- Process for conflict and Problem Management

The Team must Decide what is Important and Measure This (Task)

Early in the formation of the group, the members must decide what will be measured in the process. These items are generally critical to success and for the group to become an Effective Team. A team that has succeeded shares the following characteristics. Its members:

- Came prepared
- Offered ideas and suggestions, Provided information
- Asked for clarification/feedback
- Identified resources
- Solicited others' participation
- Kept group on task
- Was easy to work with
- Prepared materials

- Made presentation
- Participated in discussions
- Managed group conflict

The Team must Acknowledge Success and Aim for Improvement

What have we done (individually and collectively) to meet our goals and keep the Team Charter?

How can we do better for next time? (Next steps)

The Team Celebrates!

Celebrate what you have accomplished and then refocus your efforts for greater success!

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Forming a Team Charter

In your initial team meeting, you will want to spend time getting to know one another, and creating your team charter. A team charter is your set of guidelines that indicates how you will communicate, how you will accomplish tasks, and how you will keep one another accountable.

Team Charter Template[1]

Download the team charter template.

Team Charter Document for [*put your team name here*]

Team Expectations, Values & Norms:

[*Describe in point or paragraph form the expectations that you as a team have determined as core to your group. These expectations should define how you wish to work together, how you expect others to behave or contribute to the group. These will form part of the founding principles of your team. (see examples below)*]

Team Roles and Responsibilities:

The team will consistent of the following roles and responsibilities:

Role #1 (*insert Team Member Name*):

Responsibilities include:

- Ø [*Replace each role title with one role as defined by the team, including who will be assuming these roles. For each role outline the responsibilities that each team member agrees to assume.*]

Role #2 (*insert Team Member Name*):

Responsibilities include:

- Ø [*Replace each role title with one role as defined by the team, including who will be assuming these roles. For each role outline the responsibilities that each team member agrees to assume.*]

Role #3 (*insert Team Member Name*):

Responsibilities include:

- Ø [*Replace each role title with one role as defined by the team, including who will be assuming these roles. For each role outline the responsibilities that each team member agrees to assume.*]

Role #4 (*insert Team Member Name*):

Responsibilities include:

- Ø [*Replace each role title with one role as defined by the team, including who will be assuming these roles.*

For each role outline the responsibilities that each team member agrees to assume.]

Role #5 (*insert Team Member Name*):

Responsibilities include:

- Ø [*Replace each role title with one role as defined by the team, including who will be assuming these roles. For each role outline the responsibilities that each team member agrees to assume.*]

Procedures:

[The following list of procedures can be adapted to fit the needs of your team. Determine which procedures you wish to include in your charter and delete the rest from your document.]

Group Meetings:

[*This section could include the dates that you want to meet, the location, and the times. It can also outline what is expected if a team member can't make it to that meeting.*[1]]

Making Decisions:

[This section could include who is responsible for decisions in specific areas, how to come to consensus, whether consensus is necessary and under what conditions, who has the final say, etc.]

Experiencing Conflict:

[This section should include how the team wishes to resolve conflict and handle issues within the team. If your team experiences conflict, your professor will expect to see that you have used this section to try to resolve your conflict first so be sure that you are specific.]

The terms of this contract are agreed on the following date by the following team members:

Date Signed:

Signatures:

Example Expectations, Values, Norms

1. Team meetings will take place immediately after class each week.
2. All absences must be communicated to the other team members either through email, or phone before the meeting or class. Sufficient notice of at least 24 hours must be given unless there is an unforeseen emergency.
3. All team members are responsible for their portion of work which will be agreed upon by the team. If help is needed, the team will work together but each member is responsible to bring quality work and have it complete on time.
4. All submitted work should be to a high standard of quality and not just quickly done in haste. If you have problems or need help consult the group or Neil.
5. All members must treat each other with respect and treat each other equally. Opinions of team members must be respected and accepted openly. Disagreements must be communicated and team members must work together to solve any disagreements that will effect the team atmosphere and project.
6. A team member has 2 warnings before the instructor is involved. These warnings must be agreed upon by the whole team and will be either communicated through email or phone or in person to the member.
7. If a team member disagrees with a decision that is made by the rest of the team, that person is entitled to express their opinion and the situation will be handled accordingly and listened to by the entire team.
8. Deadlines will be agreed upon by all members of the

group and all members should work to have their parts in 3 days before the deadline to give room for editing and changes.

9. All the information gathered and conclusions reached during the course of this project be kept confidential to the best of each person's ability and not be released unnecessarily without written consent from the client.

[1] *It is also recommended that groups record meeting dates, who attends and what decisions are made. While this is not part of your Charter, it increases accountability within the team.*

6. Task 3: Plan Your Project

Learning Objectives

By the time you complete this section, you will be able to:

- Break down your assignment into small tasks
- Plan a realistic schedule to complete your project

A large project cannot be completed effectively in a single day. In addition, not having a realistic plan can create stress. By creating a project plan, you can complete your project by the deadline, reducing the stress of last-minute work.

Now that you have a clear idea of what you need to do, the next step is to break down the assignment into manageable "chunks". The idea of completing a major research paper may seem overwhelming, but if you can divide the task into achievable steps you will be on your way to success.

Use the chart below to break your assignment into smaller steps. You will want to create steps that can be done easily in one day, and preferably in a single work period. Consider the following example breakdown for a research paper.

Assignment Task	Target Completion Date	Person Responsible
Read assignment instructions and rubric	October 2	
Team meeting to develop charter; Create project plan	October 3	
Brainstorm ideas for product/business	October 5	
Research: Economy and Competition	October 7	
Research: Technology and Legal/regulatory	October 8	
Organize notes; write outline for each main section of the project body	October 9	
Write section 1	October 10	
Write section 2	October 10	
Write section 3	October 11	
Write section 4	October 11	
Write introduction and conclusion	October 12	
Write executive summary	October 12	
Self-edit content and organization (use the rubric)	October 14	
Writing tutor appointment	October 15	
Edit and proofread assignment	October 16	
Submit final assignment	October 18	

In the above example, the assignment is divided into smaller pieces, with a manageable amount to complete each day. It is also clear when each task has been completed. A daily work goal like "work on marketing project" is not well-defined, and can seem overwhelming. This can make it easy to procrastinate. By choosing specific and achievable goals, you may become more motivated to get started, and you will be able to measure your progress each day. Your plan will also help each group member stay accountable to their responsibilities.

Develop Your Plan

With your group members, develop a detailed project plan. Include due dates for each step, and choose a responsible team member for each area.

Download the assignment plan template.

7. Task 4: Brainstorm Business Ideas

Learning Objectives

By the end of this task, you will have:

- Reviewed a model of how to brainstorm search terms
- Generated ideas for your company and product

In marketing, brainstorming is a key part of the process of generating creative and workable ideas. In this project, you will need to brainstorm two areas:

1. Generate ideas for your company and product.
2. Brainstorm search terms for your research.

Brainstorm key course concepts and make a mind map

Mind mapping which is also called "clustering ideas", is a way of collecting ideas around a particular topic and defining connections. In the assignment process, you use mind mapping to brainstorm ideas, and to determine how these ideas are related.[1].

Below you will find an example of a mind map. You can use a mind

1. Buzan, T. (n.d.). *What is a mind map*? Retrieved from http://www.tonybuzan.com/about/mind-mapping/

map to generate ideas for your company and product. Later, you can use a mind map to brainstorm search terms for your project.

Example Mind Map (Image Credit: Rawia Inaim)

Try it!

Use the model above to brainstorm using a mind map. What potential products/business ideas can you generate? Choose the strongest idea to move forward in your project.

8. Task 5: Analyze and Research the Marketing Environment

Learning Objectives

By the time you complete this task, you will be able to

- Access relevant resources to research the marketing environment
- Access additional help from a business librarian

Research the Marketing Environment/Forces[1]

In order to create a marketing plan, you will need to thoroughly research the marketing environment. This includes factors such as:

- Political, legal, regulatory
- Economic
- Technological
- Social, cultural
- Ethical

This section leads you through the steps of doing market research.

1. **Content in this section provided by: Andre Iwanchuk, Business Librarian, Kwantlen Polytechnic University**

This example uses a clothing company. Consider how you would change the search terms for your own company and product.

How do you do market research?

1. What do you need to find out?
2. Where can you find the pieces of the puzzle?
3. Put it all together! Combine your learning and research to create your assignment or essay.

Case Study

An environmental scan and market description for a new clothing line for teens…

What do you need to find out?

Market research is often very challenging! Decide on the information you need, but keep an open mind. Some types of information are difficult to find or are expensive to obtain. And some information is simply not available. Privacy concerns, the costs of gathering and processing data, and trade secrets all make some types of information unavailable.

If you are not able to find all the information you would like, think about how you can use and combine other types of information, and what you can infer or extrapolate from the information you do have.

For each category, describe the specific information needed for the scenario of developing a new line of teen clothing:

1. Economy:
2. Competition:
3. Technology:
4. Legal/Political:
5. Consumer Factors (socio-cultural factors, demographics, psychographics)

The Puzzle Pieces

As mentioned above, the information you need is usually not available all in one place. Sometimes you can find market research reports with relevant statistics as well as analysis. Often, however, you will find small pieces of information from many, many sources and assemble them yourself into a coherent picture.

1. **Economy**

Featured Source: Government Web Pages and Publications

1. a) **Statistics Canada** (https://www.statcan.gc.ca/eng/start)
2. Under the **Subjects** menu, click on:
3. **Economic accounts**, then:
4. Search for: **Canadian Economy**
5. Scroll down to **Recent Developments in the Canadian Economy: Fall 2018** and open the report. Reports are usually a great place to start when looking at Statistics Canada information.

Is this source useful? What are a few opportunities and threats of the **Recent Developments in the Canadian Economy: Spring 2018**?

Opportunities	Threats
.	.
.	.
.	.

TIP: *Statistics Canada also has useful publications on spending, retail and wholesale, manufacturing, travel and tourism, transportation, and other sectors under the "Browse by" menu!*

1. b) **BC Stats** (http://www.bcstats.gov.bc.ca/)
    1. Under the **Statistics** menu click on **Economy**.
    2. Take a look at the variety of statistics available, then scroll down to "**Other Economic Statistics**" and click on **B.C.'s Key Indicators**.
    3. Open several of the indicators and write down the titles of two that would be useful to understanding BC's overall, recent economic climate:

Title 1:

Why?

Title 2:

Why?

1. Under the **Statistics** menu click on **Business, Industry & Trade** to access additional business related resources.

Additional Sources:

- o Banks: Major Canadian banks often release their own analyses of the Canadian economy using information from Statistics Canada and sometimes other sources. These provide an alternative viewpoint as well as the possibility of additional data sources.
- o Articles: Newspapers and business magazines will have articles on the Canadian economy. Try using the databases Canadian Newsstream and Canadian Business and Current Affairs (CBCA) Complete to find them.

2. **Competition**

Featured Sources: Online subscription databases (Hoover's

Company Records and Business Source Premier) and annual reports.

Online Subscription Database available through the library:

1. **a) Hoover's Company Records**
    1. Go to the library's website (http://www.kpu.ca/library)
    2. Click on the **RESEARCH DATABASES** tab, then Research Databases A-Z
    3. From the **Browse databases by subject area:** drop down box, choose ***Business**.
    4. Click on **Hoover's Company Records**.
    5. Click **Connect** on the Hoover's Company Records page.
    6. Search for **American Eagle Outfitters** and find the Hoovers Company Profile.

Annual Report: All publicly-traded companies must release an annual report, which contains
information about company financials and strategy.

1. **b) American Eagle Outfitters Annual Report**
    1. Go to the American Eagle Outfitters website: https://www.ae.com
    2. Scroll down to the bottom of the page and click on INVESTORS
    3. Click on FINANCIALS & FILINGS (*On most corporate websites, you will find the annual reports by clicking on links related to "Investor Relations" or "Investment.")
    4. Find the **2017 Annual Report** (Form 10-K).

Rate these sections from lowest (least important) to highest (most important) in terms of the competitive information they offer:

Circle the **Business** sub-section(s) which provide(s) the most useful competitive information:

[General] [Brands] [Key Business Priorities & Strategy] [Real Estate] [Inventory and Distribution]

Name some risk factors identified by American Eagle Outfitters that might also affect your teen clothing line:

-
-
-

1. **c) Research Databases:** Go to the library's website (http://www.kpu.ca/library)
    1. Click on the **RESEARCH DATABASES** tab, then Research Databases A-Z
    2. From the **Browse databases by subject area:** drop down box, choose ***Business**
    3. Click on **Business Source Complete**
    4. Click **Connect** on the Business Source Complete page.
    5. Search **american eagle outfitters**
    6. Review article results for current information
    7. Under **Source Types** (left side menu), select **SWOT Analyses**

Notes:

1. Do a new search in Business Source Complete for **clothing AND Canada**
2. Select **Source Types** (left side menu): **Industry Profiles**
3. Open the MarketLine Report: **Apparel Retail Industry Profile: Canada**

Notes:
Additional Sources:

- o Article databases like Canadian Business and Current Affairs (CBCA) Complete for current Canadian business news.
- o Store visits, interviews, etc.

3. **Technology**

Featured Sources: Research Databases and Google

Clothing industry associations and trade magazines are good sources of information on the impact of technology on the clothing industry. Technology could affect any aspect of the clothing business – including customer information management, design, manufacturing, distribution, marketing campaigns, and retail operations.

The traditional ways of monitoring technology trends are to read your industry's trade magazines and attend conferences and trade shows.

In an online world, how would you monitor technology trends? Try using research databases and web searching. For example:

1. **a) Research Databases**
    1. Business Source Complete
    2. Search for:

technologyical innovations

AND

textile industry

1. Under **Source Types** (left side menu), limit your results to **Trade Publications**.

Note the names of the journals. Write down two journal names that specialize in clothing or textiles:

-
-

From the list of search results in Business Source Complete:

1. Click on **Bringing New Technology To Market**

2. Click on **PDF Full Text**
3. Examine the article.

Take a look at the table of contents for that issue of *Textile World* on the left hand side. Page through the journal and note another article about a technological innovation:

-

1. **b) Google**
    1. Go to Google and locate the website for the American Apparel and Footwear Association
    2. Click on Tools & Research

Another method:

1. Go to Google advanced search (https://www.google.ca/advanced_search)
2. Search for **clothing and technology** and set the **file type:** to **(.pdf)**
3. Click on **last update:** and change to **upto a year ago**
4. Review results – the file type limiter and date limiter are a way of quickly scanning for more "substantial" content published in the last year.

4. **Legal / Regulatory**

Featured Source: Library Catalogue / Book Search. Go to the library's website (http://www.kpu.ca/library)

1. Click on the **CATALOGUE** tab
2. Search for **marketing law Canada**
3. Find: Advertising and Marketing Law in Canada
4. Review catalogue record **Subject terms.** Click on subject terms

to find additional books on the same subject.

Additional Sources:

- o LawSource legal research database with articles and case law.
- o Innovation, Science and Economic Development Canada website has relevant information under the Find your industry sector
- o Industry associations: the Canadian Apparel Federation has a Government section on their website.

5. **Consumer Factors:**

Sociocultural Information:

Featured Source: Canadian Business and Current Affairs (CBCA) Complete database

Sociocultural trends are often common sense – things you have observed yourself and/or heard about on the news. In a general sense they answer the question, "What is happening in Canadian society?"

For example, do you think that teens are becoming more environmentally aware? If so, can you find any information to support your idea?

1. **a) Research Databases:** Go to the library's website (http://www.kpu.ca/library)
   1. Click on the **RESEARCH DATABASES** tab, then Research Databases A-Z
   2. From the **Browse databases by subject area:** drop down box, choose *__Business__
   3. Click on **Canadian Business and Current Affairs (CBCA) Complete**
   4. Click **Connect** on the CBCA Complete page.
   5. Search: **environmental**

AND

Canada

AND

teenagers

Write down the title of one article that looks useful:

TIP: Try searching for general characteristics of teens. For example, search for **millennial generation** and compare the results.

Additional Sources:

- o Library Catalogue (detailed studies of the "millennial" generation, for example)

Go to (http://www.kpu.ca/library) and click on the **CATALOGUE** tab

- o Canadian Newsstream
- o Google
- o Statistics Canada reports

Demographics and Psychographics:

Featured Source: *FP Markets, Canadian Demographics*

FP Markets, Canadian Demographics is a book, updated annually, that provides demographic overviews for Canadian municipalities, including statistics on current population and projections, income, retail sales, labour force, average household expenditures, families, languages, vehicles, and housing.

It also provides population characteristics using 59 psychographic categories, called PSYTE HD (a proprietary, market segmentation classification system).

Additional Sources:

- o Statistics Canada
- o BC Stats

Putting it all Together!

If you were writing your report, you would now have much of the information you'd need, and could get started combining and synthesizing it into your environmental scan and market segmentation report.

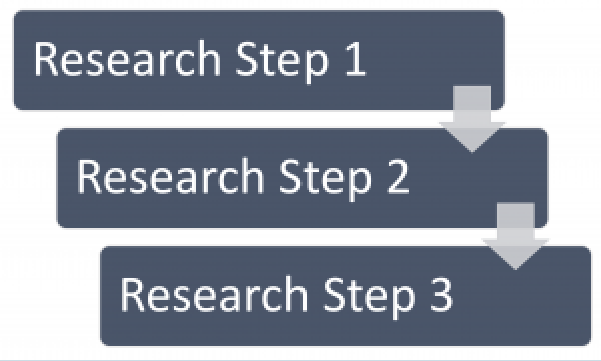
You can do the same kind of thinking about the research process, using your experience and preferences.

What, in your opinion, are the top three most useful sources from this section?

1.
2.
3.

Exercise

Create a flow chart that documents your plan for researching your chosen business for your own report.



HELP:

- Andre Iwanchuk, Business Librarian – Andre.Iwanchuk@kpu.ca / 604.599.3486
- Ask A Librarian / AskAway service (IM with a Librarian) http://www.kpu.ca/library/services/askalibrarian

9. Task 6: Integrate and Cite Information from Research

Learning Objectives

By the time you have completed this task, you will be able to:

- Use paraphrasing strategies to avoid accidental plagiarism
- Extract key information from articles that you will use to prepare research summaries

Integrating Material from Research

One of the main tasks in academic research is to incorporate material from other sources and to discuss this material in light of the argument you are making. One popular book on academic writing uses the phrases "They Say/I Say" in its title (Graff, Birkenstein & Dunst, 2012); this is an excellent way to describe this process.[1]

1. Graff, G., Birkenstein, C., & Durst, R. K. (2012). "They say/I say": the moves that matter in academic writing: with readings (2nd ed). New York: W.W. Norton & Co.

They Say	I Say
-Information that you learned from your research and reading (either a quote, paraphrase, or summary).	-Your discussion of this information, related to how it supports the key points in your paragraph, and how it supports your thesis.

Quote, Paraphrase, Summarize – What's the Difference?

1. Direct quote: This uses information *word for word* from your original source. Short quotations must be in "quotation marks", while longer quotations are indented (search for information on *block quotations* for details)
2. Paraphrase: Ideas from another source are written in your own words. It is NOT enough just to change a few words. You must rewrite the idea in your own sentence or paragraph. All paraphrases must include in in-text citation after the information.
3. Summary: A much shorter presentation of the information you have read – for example, a sentence that describes the information in an entire chapter or research article.

All of the above require an in-text citation after the information is presented.

How to Paraphrase

Writing an original paraphrase takes work! The following steps can help you avoid accidental plagiarism when paraphrasing.

1. Read the text 2 or more times, until you are sure that you understand it well. Take the time to look up words that you do not understand.
2. Close the book or put the article aside. Say the meaning of what you have just read out loud.
3. Based on the information you said aloud, write down your paraphrase.
4. Check the paraphrase against the book or article to make sure that key details are correct.

Paraphrase Practice:

Consider the following paragraph:

Self-testing is one of the most powerful study strategies. Creating good questions requires you to think critically about what you need to learn (planning). Testing whether you can answer questions without referring to a text or notes, as you would in an exam, allows you to effectively monitor your progress. The trick to effective self-testing is to ask the right questions. In university, you are required to move beyond recalling basic facts and details, and must learn to apply and analyze material deeply (Kwantlen Polytechnic University Learning Centres, 2018, p.63). [2]

In this exercise, you will follow the four step method described above to create a paraphrase of this paragraph.

- Read the paragraph at least two times, making sure you understand it thoroughly.

- Look away from the exercise and say your paraphrase out loud.

- Now, without looking at the original information,

2. Kwantlen Polytechnic University Learning Centres. (2018). University 101: Study, Strategize, Succeed. (C. Page, Ed.). Surrey: Kwantlen Polytechnic University. Retrieved from https://pressbooks.bccampus.ca/studystrategizesucceed/

write your original paraphrase on a separate sheet of paper.

- Check to see that your paraphrase is accurate.

As you take notes from articles to prepare your research summary, take the time to paraphrase, rather than copying quotations. This will help you to understand the article more clearly, and will help you avoid accidental plagiarism when it comes time to write.

Consider the following template for notetaking. [The template can be downloaded here.](#)[3]

Using APA

You are required to use APA style in this assignment. Unsure of how to do this? Or perhaps you have done this before, but are unsure of some of the small details. The video quiz below will help you to review APA citation basics. After the quiz, you will find links to library resources where you will find further help.

An interactive or media element has been excluded from this version of the text. You can view it online here: https://kpu.pressbooks.pub/marketing1199/?p=40

3. McMaster University (2009) Three Column Note taking. http://www.mcmaster.ca/academicintegrity/students/typeofad/plagiarism/3ColmNote.html

KPU Library APA Guide

If you have questions as you work, use the Ask a Librarian page to send your question off for a quick answer.

10. Task 7: Perform an STP Analysis

Learning Objectives

By the end of this task, you will be able to:

- Perform an STP analysis
- Use your research to identify market segments

CONTENT ON STP ANALYSIS HERE

Stats Canada research
Demographic research
Primary research

11. Task 8: Integrate the Marketing Mix to Create a Strategy

Learning Objectives

By the time you complete this section, you will be able to:

- Identify factors related to product, price, place and promotion to create a marketing strategy

ADD IN CONTENT ON HOW TO APPLY THE 4P'S IN THIS PROJECT

12. Task 9: Draft Your Report and Appendices

Learning Objectives

By the time you complete this section, you will have

- Review key characteristics of a successful marketing report from your rubric and assignment guidelines
- Write a first draft for each section of your report

Now that you have completed your research, you are ready to move on to writing your first draft. A few reminders as you begin:

1. Now is a good time to review your rubric and assignment guidelines. You will want these to be fresh in your mind as you write, so that you can ensure that you effectively meet your instructor's requirements.
2. Before you write each section, take some time to organize and outline your key information. This will result in a draft that more clearly presents your key ideas.
3. Leave time after drafting for the editing process. Ideally, you will have your first draft complete at least a day or two before the assignment is due.

OTHER GUIDELINES ABOUT SPECIFIC SECTIONS?

13. Task 10: Write an Executive Summary

Learning Objectives

By the time you complete this section, you will be able to:

- Identify the key components of an executive summary in a marketing report
- Draft a complete and concise executive summary

Writing an Executive Summary

First of all, before you begin writing, ask yourself some key questions about executive summaries.

1. What are the criteria for your executive summary in this assignment?
2. What is the purpose of an executive summary? What do you want the reader to think, do, or feel as a result of reading the document?
3. Who is your audience? If someone wrote an executive summary outside of a classroom setting, who might the readers be?

Now, consider the example executive summaries below.

Executive Summary Example 1

This report provides an analysis and evaluation of the current and prospective profitability, liquidity and financial stability of Outdoor Equipment Ltd. Methods of analysis include trend, horizontal and vertical analyses as well as ratios such as Debt, Current and Quick ratios. Other calculations include rates of return on Shareholders Equity and Total Assets and earnings per share to name a few. All calculations can be found in the appendices. Results of data analyzed show that all ratios are below industry averages. In particular, comparative performance is poor in the areas of profit margins, liquidity, credit control, and inventory management.

The report finds the prospects of the company in its current position are not positive. The major areas of weakness require further investigation and remedial action by management. Recommendations discussed include:
improving the average collection period for accounts receivable·
improving/increasing inventory turnover·
reducing prepayments and perhaps increasing inventory levels

The report also investigates the fact that the analysis conducted has limitations. Some of the limitations include:
forecasting figures are not provided nature and type of company is not known nor the current economic conditions data limitations as not enough information is provided or

enough detail i.e. monthly details not known results are based on past performances not present. [1]

Executive Summary Example 2

This report was commissioned to examine why the sales volume of Choice Chocolate has dropped over the past two years since its peak in 1998 and to recommend ways of increasing the volume.

The research draws attention to the fact that in 1998, the market share of Choice Chocolate was 37%. The shares of their key competitors such as Venus and Bradbury were 22% and 18% respectively. The size of the chocolate market then was $36 million. Over the next two years, although Choice Chocolate retained its market share the volume of sales in the whole market decreased to $29 million. Further investigations reveal that this market shrinkage coincided with an increase in health awareness amongst consumers who regard the milk and sugar ingredients in chocolate as negative; moreover, since the second half of 1999, an increasing number of rival ‘health candies’ had appeared on the market. These claimed to offer the consumers a healthy alternative. These factors appear to be the major causes of the decreased sales volume of Choice Chocolate.

Slim Choice is the latest chocolate range put forward by the R & D Department of Choice Chocolate. The report evaluates this range and concludes that it would be an ideal candidate to meet the challenge presented by the market

1. Excerpt from Woodward-Kron, R. (1997) Writing in Commerce: a guide to assist Commerce students with assignment writing, (Revised edition), Centre for the Advancement of Teaching and Learning, The University of Newcastle.

and could satisfy the new consumer demand since it uses significantly reduced milk and sugar ingredients and is endorsed by renowned health experts. According to 97% of the 2000 subjects tested recently, it also retains the same flavour as the original range.

It is recommended:
that Choice Chocolate take immediate measures to launch and promote Slim Choice alongside its existing product range;
that Slim Choice adopt a fresh and healthy image;
that part of the launch campaign contains product endorsement statements by renowned health experts;
that Slim Choice be available in health food shops as well as in traditional chocolate retail outlets. [2]

What do you notice about the content of these executive summaries?

How is an executive summary different from an introduction?

An interactive or media element has been excluded from this version of the text. You can view it online here: https://kpu.pressbooks.pub/marketing1199/?p=50

2. Summary text from: https://unilearning.uow.edu.au/report/4bi1.html#Footnote1

14. Task 11: Format and Polish Your Report

Learning Objectives

By the time you complete this chapter, you will be able to

- Follow a systematic editing process to revise your first draft
- Format your business report using appropriate conventions
- Access additional support for revising your work

Editing Your Report

You've completed your first draft. Congratulations! But are you really finished your assignment?

Editing is an important step in creating a polished and professional report. Knowing how to edit your work and format it effectively is a key skill for your professional practice.

Complete this video quiz to learn about a systematic process for editing your work.

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here:
https://kpu.pressbooks.pub/marketing1199/?p=52

As you heard in the video quiz, proofreading is another key step in polishing your paper. If you want to learn more about how to proofread effectively, watch this video.

Following Formatting Conventions

As a business student, you are working to develop your professional writing skills. Part of this is learning to follow the conventions for formatting business reports. Your assignment instructions give guidelines for how your report is to be presented. Complete the quiz below to test your knowledge of these guidelines.

The original version of this chapter contained H5P content. This content is not supported in cloned books. You may want to remove or replace this section.

Accessing Support

The Learning Centre offers writing tutoring in a variety of formats: face to face and online. Because this is a group project, at least two members of your group should be actively involved in tutoring visits. You can book appointments at tlc.kpu.ca. Tip: Book an appointment early to be sure you have your preferred time slot. Appointments can fill up quickly.

If you need assistance booking an appointment, the video below demonstrates the steps.

A YouTube element has been excluded from this version of the text. You can view it online here: https://kpu.pressbooks.pub/marketing1199/?p=52

15. Task 12: Prepare Your Presentation

Learning Objectives

By the time you complete this section, you will be able to:

- Create a professionally appropriate PowerPoint
- Verbally communicate highlights of your marketing plan to an audience

Using PowerPoint to Create Slides

1. **Add Text to Slides**

- Don't put too much text on each slide. Too many words are hard to read, confusing, and tiring
- Use punctuation when you use complete sentences.
- Use font styles that are easy to read.
- Use at least 24 font size, larger for headings or titles.
- Use colours, bold text, and underlining

2. **Add visuals (pictures, charts, and diagrams) to slides**

Pictures should relate to the content on your slide
You can include:

- Images/ pictures

- Graphs, charts, tables

Organize Your Ideas

A presentation has three parts: The introduction (beginning), the body (middle) and the conclusion (end). To plan your presentation, decide what you will say in each section.

	Purpose	My ideas for this section
Introduction	1. Starts with something interesting 2. Tells your main point 3. Tells what you will talk about	
Body	1. Presents your main points 2. Gives information to support your ideas **Remember to clearly indicate where you found your information. Use phrases like "according to…" or "in a study by…"	
Conclusion	· Tells the main point again · Reviews what you talked about · Makes a final statement	

Giving the Presentation: Using your Voice and Body Language

- Use your **breath** (don't forget to breathe)
- Check your **volume** (speak loudly)
- Change **pitch** (make sure your voice goes up and down when it should)

Body Language and Communication:

Much of our communication is non-verbal (we communicate with our body and actions, not only by what we say).

- Use natural gestures (hand movements)
- Look at your audience when you present
- Don't read your presentation
- Dress nicely for your presentation

Activity: Watch a TED talk on the internet. How does the speaker use their voice and body when they present?

Practice Your Presentation

- Practice your presentation with a friend or family member.
- Record yourself and watch how you speak.
- Time yourself – is your presentation too long or too short? [1]

Top Ten Reasons Why Your Presentation Stinks! (from KPU Marketing Faculty Bob Crockett)

1. Materials developed by: Marti Alger, Learning Strategist (marti.alger@kpu.ca) and adapted by Christina Page, Learning Strategist (christina.page@kpu.ca) Based on : Writing Center, Texas A. and M. University. (2017, October 03).Oral Presentations. Retrieved from http://writingcenter.tamu.edu/Classroom-Workshops/Graduate/Oral-Presentations

Reason #10: It's all data no story

Make your presentation tell a story, ideally with the audience as the heroes.

Reason #9: Your visuals are too fancy

Use the minimum visuals that you need to tell the story

REASON #8: Your slide background is too busy!

Use a simple, single color background. Always.

REASON #7: Your fonts are unreadable!

Use large fonts in simple faces (like Ariel); avoid **boldface**, *italics* and UPPERCASE.

REASON #6: Your graphics are too complex!

Only include simple graphics; highlight the data point that's important.

REASON #5: You are all opinion, no fact!

Only state opinions that you can back up with quantifiable data.

REASON #4: You speak fluent biz-blab!

Just stop it. Cold turkey.

REASON #3: You drifted off topic!

Only include material that's relevant to your overall message.

REASON #2: It was too dn long!**

Always make your presentation *less than half as long* as you think it should be.

REASON #1: You read from your slides!

Use slides to reinforce your message rather than to outline your data points.