



## COURSE OUTLINE CENTRE FOR BUSINESS

**COURSE NAME:** Financial Analysis for Marketing Strategy  
**COURSE CODE:** MARK 1106  
**CREDIT HOURS:** 42 Hours  
**PREREQUISITES:** MARK 1027  
**COREQUISITES:** None  
**PLAR ELIGIBLE:** YES (X) NO ( )  
**EFFECTIVE DATE:** Fall 2009  
**PROFESSOR:** **OFFICE #:**  
**PHONE:** 416-415-5000 **Email:**

**NOTE TO STUDENTS:** Academic Departments at George Brown College will **NOT** retain historical copies of Course Outlines. We urge you to retain this Course Outline for your future reference.

FOR OFFICE USE ONLY		
<b>ORIGINATOR:</b> _____	SIGNATURE	DATE
<b>CHAIR:</b> _____	SIGNATURE	DATE
<b>DATE OF REVISION:</b> _____		

**EQUITY STATEMENT:** George Brown College values the talents and contributions of its students, staff and community partners and seeks to create a welcoming environment where equity, diversity and safety of all groups are fundamental. Language or activities which are inconsistent with this philosophy violate the College policy on the Prevention of Discrimination and Harassment and will not be tolerated. The commitment and cooperation of all students and staff are required to maintain this environment. Information and assistance are available through your Chair, Student Affairs, the Student Association or the Human Rights Advisor.

**STUDENT RESPONSIBILITIES:** Students should obtain a copy of the *Student Handbook* and refer to it for additional information regarding the grading system, withdrawals, exemptions, class assignments, missed tests and exams, supplemental privileges, and academic dishonesty. Students are required to apply themselves diligently to the course of study, and to prepare class and homework assignments as given. Past student performance shows a strong relationship between regular attendance and success.

## COURSE DESCRIPTION:

This course is a continuation of MARK 1027, Marketing Management. The student is provided with an opportunity to become familiar with some of the marketing metrics used by professional marketers to analyze marketing opportunities, measure marketing effectiveness and solve marketing problems. The focus will be on analysis of internal and external data used to measure and evaluate marketing from a financial point of view. Topics include an understanding of the use and analysis of financial statements, profitability analysis, marketing promotion efficiency metrics and pricing analysis. Application of the analytical tools will be used to solve strategic marketing problems using the case method.

## ESSENTIAL EMPLOYABILITY SKILLS:

As mandated by the Ministry of Training, Colleges and Universities essential employability skills (EES) will be addressed throughout all programs of study. Students will have the opportunity to **learn (L)** specific skills, to **practice (P)** these skills, and/or **be evaluated (E)** on the EES outcomes in a variety of courses. The EES include communication, numeracy, critical thinking & problem solving, information management, interpersonal and personal skills. The faculty for this course has indicated which of the EES are either Learned (**L**), Practiced (**P**) or Evaluated (**E**) in this course:

Skill	L	P	E	Skill	L	P	E
1. communicate clearly, concisely and correctly in the written, spoken and visual form that fulfills the purpose and meets the needs of the audience		x	x	7. locate, select, organize and document information using appropriate technology and information sources			
2. respond to written, spoken or visual messages in a manner that ensures effective communication		x		8. show respect for the diverse opinions, values, belief systems, and contributions of others		x	
3. execute mathematical operations accurately	x	x	x	9. interact with others in groups or teams in ways that contribute to effective working relationships and the achievement of goals		x	x
4. apply a systematic approach to solve problems	x	x	x	10. manage the use of time and other resources to complete projects		x	
5. use a variety of thinking skills to anticipate and solve problems	x	x	x	11. take responsibility for one's own actions, decisions and consequences		x	
6. analyze, evaluate, and apply relevant information from a variety of sources		x	x				

## **COURSE OUTCOMES:**

1. Analyse financial statements to evaluate marketing performance
  - a. Explain the elements of financial statements – Balance sheet, Income statement
  - b. Explain the purpose of each financial statement and how they are used in making decisions
  - c. Use analytical tools to measure impacts of marketing decisions
  - d. Discuss the use of benchmarks to evaluate financial performance
2. Measure financial and market performance using analytical tools
  - a. Perform vertical and horizontal analysis of financial reports
  - b. Perform ratio analysis and explain what the results mean
  - c. Conduct marketing metrics to evaluate sales and market performance
3. Use financial tools to plan, track and control marketing activities
  - a. Discuss the forecasting methods used to prepare a marketing budget
  - b. Discuss tools to manage budgets including cost analysis
  - c. Discuss pricing objectives and strategies
4. Use financial tools to evaluate marketing opportunities
  - a. Discuss competitive marketing strategies
5. Apply tools to make strategic marketing decisions using marketing case situations

## **DELIVERY METHODS:**

In class lecture, discussions and exercises, and case study analysis

## **LIST OF TEXTBOOKS AND OTHER TEACHING AIDS:**

**MARK 1106 Course Pack required** /Additional course materials will be distributed in class and/or on WebCT

### **Resources:**

Use text from MARK 1027 **A Framework for Marketing Management**, Kotler, Keller & Cunningham, Can Ed 2008 Pearson Education Canada [www.pearsoned.ca/kotler](http://www.pearsoned.ca/kotler)

## **TESTING POLICY:**

**Exemption or deferral of a midterm exam or final exam is not permitted except for a medical or personal emergency.**

Regarding absence from the final exam:

- Professor must be notified by e-mail before the examination
- Documentation must be presented to the professor within three working days.
- Appropriate documentation, as determined by the professor, must be submitted – such as: a doctor's note, court summons or funeral documentation

- If the majority of the course work has been completed with a passing performance, and the documentation is acceptable, an "Incomplete" grade (INC) will be entered by the instructor. An INC grade will not be granted if term work was missed or failed.

- The final examination must be written within 60 days of the submission of the incomplete grade. Failure to do this will result in an F grade.

**Students must pass the combined mid term and final test/exam to pass the course.**

**ASSIGNMENT POLICY:**

**In-class assignments:**

Success in this course is based heavily on in-class participation and assignments (assignments may be given impromptu); therefore attendance and active in-class participation is essential to a student’s success. All in-class assignments must be completed in class; they cannot be made up with a take-home assignment. Failure to attend these classes will therefore result in a grade of zero for that particular assignment.

**Assigned work:**

Late assignments are not accepted except in a medical or personal emergency as stated in above testing policy.

**Group work:**

This course is also based on group work. In some cases your groups will be assigned and in others you can select your own groups. The professor will decide. It is the individual student’s responsibility to ensure they are an active, contributing member of the group.

**EVALUATION SYSTEM:**

<b>Assessment Tool:</b>	<b>Description:</b>	<b>Outcome(s) assessed:</b>	<b>EES assessed:</b>	<b>Date / Week:</b>	<b>% of Final Grade:</b>
Mid Term Test	Short answer	1-4	1,3,4,5	6	25
Final Test	Case Short answer	All	1,3,4,5,	15	30
Group Case Analysis	3 cases – each group will present one of the three	1,4,5	1,3,4,5,9	10,12,13	24
Assignments/quizzes /participation	In class mini assignments & cases	All	All	All	21
				<b>TOTAL:</b>	<b>100%</b>

**GRADING SYSTEM**

The passing grade for this course is:     D     Students must pass final test to pass the course.

A+	90-100	4.0	B+	77-79	3.3	C+	67-69	2.3	D+	57-59	1.3	Below 50	F	0.0
A	86-89	4.0	B	73-76	3.0	C	63-66	2.0	D	50-56	1.0			
A-	80-85	3.7	B-	70-72	2.7	C-	60-62	1.7						

Excerpt from the College Policy on Academic Dishonesty:

The *minimal* consequence for submitting a plagiarized, purchased, contracted, or in any manner inappropriately negotiated or falsified assignment, test, essay, project, or any evaluated material will be a grade of zero on that material.

To view George Brown College policies please go to [www.georgebrown.ca/policies](http://www.georgebrown.ca/policies)

### TOPICAL OUTLINE:

	<b>Topic / Task</b>	<b>Outcome(s)</b>	<b>Content / Activities</b>	<b>Resources</b>
1	Introduction to the course & the role of marketing metrics in marketing strategy	1	Financial accountability – role of marketing What needs to be measured and why – common questions of marketers	Course Pack ( CP) Module 1
2	Understanding Financial statements	1,2	Stakeholder needs Income Statement and Balance sheet – meaning of each <b>ICA #1</b>	CP Module 2
3	Measuring financial performance –	1,2	Financial statement analysis Profit, productivity and debt ratios. Horizontal and vertical analysis <b>ICA #2</b>	Text Ch 2 pp 31-34 CP Module 3
4	Developing strategy Introduction to the case method/ form work groups/Mini Practice Case		<b>Evaluating alternative strategies and their impact/ Pro Forma development /Sensitivity analysis/ Break even ICA# 3 Mini case</b>	CP Module 4
5	Evaluating Marketing effectiveness /Key performance indicators ( KPI)		<b>Key marketing efficiency evaluations e.g. market share Benchmarking vs. industry ICA # 4 Mini Case</b>	CP Module 5
6	Managing the marketing plan - measures for control	3	How to forecast and build a budget? Variance analysis <b>Understanding and Managing costs ICA # 5 Mini Case</b>	CP Module 6
7	Marketing strategy – dealing with competition Pricing Strategy	4,5	Competitive strategies Pricing objectives and strategy <b>ICA #6 Mini Case</b>	CP Module 7 TEXT pp 150-160 and Ch 12 pp 203-213, 216-218
8	<b>INTERSESSION WEEK</b>			
9	Midterm test			
10	Case preparation and presentation tips		Review test results/ review marketing strategy Practice case / ICA # 7 Assign case 1	<b>Assign Case 1</b>
11	Present Case 1	5	Case 1 presented and discussed	<b>Case 1 due</b>
12	Present Case 2	4,5	Case 2 presented and discussed	<b>Case 2 due</b>
13	Present Case 3	4,5	Case 3 presented and discussed	<b>Case 3 due</b>
14	Marketing Strategy Review for final	All		
15	<b>Final Exam</b>	All	Comprehensive Case	
<b>Please note: this schedule may change as resources and circumstances require.</b>				
For information on withdrawing from this course without academic penalty, please refer to the College Academic Calendar: <a href="http://www.georgebrown.ca/Admin/Registr/PSCal.aspx">http://www.georgebrown.ca/Admin/Registr/PSCal.aspx</a>				