

## Dillard College of Business Administration

# SPECIAL TOPICS IN MKTG

## CONTACT INFORMATION

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## REQUIRED MATERIALS

1. [Class overview https://youtu.be/LnTz8vKM2eg](https://youtu.be/LnTz8vKM2eg)
2. *An Introduction to Marketing Metrics*, by Gopala Ganesh, Fountainhead Press. ***The accompanying lectures for the cases in this textbook are YouTube videos attached in this syllabus.***
  - Hardcopy book from MSU Bookstore
  - E-bookfrom [Online book https://www.vitalsource.com/products/an-introduction-to-marketing-metrics-ganesh-gopala-v9781644851302](https://www.vitalsource.com/products/an-introduction-to-marketing-metrics-ganesh-gopala-v9781644851302)
3. [MBTN link https://www.mbtn.academy/](https://www.mbtn.academy/) Purchase access to a specific set of 4 MBTN modules. MBTN will contact you at your MSU Texas email address to complete the purchase and activate your login credentials.  
*\*If you do not pass the certificates by the end of the semester, MBTN allows you to try again until end of July. However, your grade remains unchanged once the semester ends. These certificates are your differentiators. Please update on your resumes once you complete them.*
4.  LinkedIn Certificates: Google Ads Advanced and Google Analytics You can start your free trial for 1 month to study and take these certifications at no cost. Plan smart to save money!
5. **Strongly recommended text book:** *Marketing Metrics 3rd Edition* by Paul Farris, Neil Bendle, Phil Pfeifer and David Reibstein.
6. **Webcam**, notepad, calculator, flash drive, and computer. (Note: we shall be using Excel for all assignments. If you are a MAC user, please access and use Excel for PC via the Virtual Lab. Learn how to do this by yourself).

## COURSE DESCRIPTION

Students learn various marketing metrics and performance indicators used by marketing teams and decision-makers to demonstrate the effectiveness of marketing activities across marketing functions. Examples of metrics include profit impact metrics, internal rate of return, channel markups, customer lifetime value, break-even analyses, and web metrics. Students will also have opportunities to earn industry marketing metrics certificates to enhance their quantitative and marketable skills to be competitive in the job market.

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This course aims to provide a basic, managerially relevant understanding of various marketing metrics, which are measures of past or planned performance and serve as benchmarks to guide managerial decision making in a marketing context.

1. Describe the metrics for marketing decision making
2. Recognize the data requirements for each marketing metric.
3. Compute each marketing metric correctly.
4. Interpret each marketing metric in managerial contexts
5. Explain how the metric, as interpreted, would inform and influence marketing decisions.
6. Construct worksheets to calculate various marketing metrics.
7. Construct charts to present the calculated marketing metrics.

## LEARNING GOALS

The fundamental goal of this class is to understand the relationship between marketing decisions and their financial implications and/or consequences.

1. Produce creative responses to business situations.
2. Integrate knowledge across business disciplines.
3. Understand how to solve marketing problems in the context of market opportunity analysis, market segmentation, and planning and implementing a marketing mix.
4. Learn analytical methods that you will be (a) asked to use senior level marketing classes, and (b) expected to know in your marketing career.
5. Use simple mathematical techniques: +, -, \*, /, %, some ^ and working with index numbers. However, there will be lots of hands-on and very intensive analysis.
6. Learn how to use Excel and Power Points.
7. Learn to pay *meticulous* attention to detail in all the assignments
8. Appreciate marketing problems surrounding the four Ps.

## PHILOSOPHY AND EXPECTATIONS

My expectation from this class (i.e., you and I) is captured in one of my favorite quotes from a fortune cookie at a Chinese Restaurant:

“By asking for the impossible we obtain the best possible.”

*This course is difficult, challenging and will stretch you to your limits. However, with the right attitude and hard work (on your part), you can make the experience intrinsically rewarding and fulfilling. You can even make the experience fun for yourself. Remember, only you can do it. As regards my contribution, I can promise you that I shall give you my best. Of course, I also*

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*expect the best from you. This is the basic underlying philosophy behind this class (and for other classes and may be even life in general).*

## CLASS POLICY AND CONDUCT

### Professionalism

The faculty, staff, and students of the Dillard College of Business Administration are committed to being a “professional” in our words, conduct, and actions. The qualities of a professional include:

- A commitment to the development of specialized knowledge
- Competency in analytical, oral and written communication skills
- Self-discipline
- Reliability
- Honesty and integrity
- Trustworthiness
- Timeliness
- Accountability for words and actions
- Respect for others and other cultures
- Politeness and good manners
- A professional image (professionals look professional)
- An awareness of their environment and adaptability to different settings
- Confidence without arrogance
- A commitment to giving back to your community

### Academic Integrity

With regard to academic honesty students are referred to the “Student Honor Creed” in the current Midwestern State University Undergraduate Catalog. Academic dishonesty (cheating, collusion, and plagiarism) is taken seriously and will be investigated. The minimum penalty is an "F" in this course and referral to the Dean of Students for disciplinary action, which may result in expulsion from the University. [Student handbook https://msutexas.edu/student-life/\\_assets/files/handbook.pdf](https://msutexas.edu/student-life/_assets/files/handbook.pdf)

### Submitting Assignments

All assignments are to be submitted in PDF format and SHALL NOT be accepted in any other way. For every 24 hours of late submission, 25% of earned grade for that assignment will be deducted. Please maintain an electronic copy of all assignments “as submitted”, showing the actual date and time of completion. I shall ask for **both** a hard copy and a disk copy when necessary.

### Non-submission of Quizzes/Assignments/Extra credit

If you do not complete all the required quizzes/examinations/assignments, and extra credit opportunities, you will be denied all doles, curves, etc.

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### Communication

I believe that frequent and open communication between the professor and students enhances the quality of learning. I urge you to use the university email (outlook) to let me know your concerns or queries. I do not discuss grades during the last two weeks of the semester. At that late stage I cannot do anything to help you. This course offers sufficient opportunity to make good grades without having to resort to extra credit.

### Grade Appeals

Any student who believes a grade has been inequitably awarded should first contact the instructor who awarded the grade to discuss the issue and attempt to resolve the differences. A student has 30 days following the first day of the succeeding semester to file a written appeal with the dean of the instructor's college in which the course was taught. Refer to the Undergraduate Catalogue for further details. **See the *MSU Student Handbook for University policy on grade appeal.***

### Grade Changes

No grade except "I" may be removed from a student's record once properly recorded. Changes are not permitted after grades have been filed except to correct *documented clerical errors*. Requests for error correction must be initiated immediately after the close of the semester for which the grade was recorded.

### Awarding and Removal of I

I - incomplete; a non-punitive grade given only during the last one fourth of a semester and only if a student (1) is passing the course; (2) has reason beyond the control of the student why the work cannot be completed on schedule; and (3) arranges with the instructor to finish the course at a later date by completing specific requirements that the instructor must list on the grade sheet. **A student may remove a grade of I within 30 days by completing the stipulated work.**

### Final Grades

The instructor posts final grades in *Desire2Learn*. Do not call or stop by the office to ask for grades.

### General policies

Exam dates are firm. The student is responsible to have all materials prepared on time. Please feel free to contact the instructor as needed. I want to see everyone do well in this course, but a big part of success depends on the student. I view everyone as an "A" student until proven otherwise. I expect on-time attendance, preparation, participation, and professional effort. Students who have a good attitude and strive to meet these expectations will find me very supportive - I will do whatever I can to help students succeed in this course and beyond.

Campus Carry: Senate Bill 11 passed by the 84<sup>th</sup> Texas Legislature allows licensed handgun holders to carry concealed handguns on campus, effective August 1, 2016. Areas excluded from concealed carry are appropriately marked, in accordance with state law. For more information regarding campus carry, please refer to the University's webpage at this link: <http://mwsu.edu/campus-carry/rules-policies>.

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### Americans with Disabilities Act

Midwestern State University is committed to providing equal access for qualified students with disabilities to all university courses and programs, and by law all students with disabilities are guaranteed a learning environment that provides reasonable accommodation of their disability. This guarantee is provided through Section 504 of the Rehabilitation Act of 1973 and the Americans with Disabilities Act. The ADA reads: “No qualified individual with a disability shall, by reason of such disability, be excluded from participation in or be denied the benefits of the services, programs, or activities of a public entity, or be subject to discrimination by any such entity.” The Director of Disability Support Services serves as the ADA Coordinator and may be contacted at (940) 397-4140, TDD (940) 397-4515, or 3410 Taft Blvd., Clark Student Center 168.

### IMPORTANT ADMINISTRATIVE DATES

It is the student's responsibility to keep track of administrative dates and initiate the required paperwork for drops etc. If you withdraw from the class, it is your responsibility to remove your name from the class rolls. If your name is not removed then you may receive an ‘F’ for the course at the end of the semester.

### GRADING

Your overall semester grade will include evaluations of your performance in the examinations, class participation, and HW assignments.

Table 1: Class components

Category	Maximum point	Helpful links and explanations
MBNT Advertising Metrics certificate	150	<a href="https://youtu.be/188nmeIYLMU">MBTN introduction</a> <a href="https://youtu.be/188nmeIYLMU">https://youtu.be/188nmeIYLMU</a>  <a href="https://www.mbtn.academy/">https://www.mbtn.academy/</a> <i>*If you do not pass the certificates by the end of the semester, MBTN allows you to try again until end of July. However, your grade remains unchanged once the semester ends. These certificates are your differentiators. Please update on your resumes once you complete them.</i>
MBTN Customer Lifetime Value Metrics certificate	150	<a href="http://www.management-by-the-numbers.com/">MBTN http://www.management-by-the-numbers.com/</a> <i>*If you do not pass the certificates by the end of the semester, MBTN allows you to try again until end of July. However, your grade remains unchanged once the semester ends. These</i>

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Category	Maximum point	Helpful links and explanations
		<i>certificates are your differentiators. Please update on your resumes once you complete them.</i>
Marketing Metrics Project	150	<a href="#">Metrics project instruction</a> <a href="https://youtu.be/bIzNr7xB67M">https://youtu.be/bIzNr7xB67M</a>
LinkedIn Advanced Google Analytics certifiante	20	<a href="https://www.linkedin.com/learning/advanced-google-analytics-4/gain-a-better-understanding-of-your-data">https://www.linkedin.com/learning/advanced-google-analytics-4/gain-a-better-understanding-of-your-data</a> 1h 29m
LinkedIn AdWords certificate	30	<a href="#">LinkedIn</a> <a href="https://www.linkedin.com/learning/google-ads-adwords-essential-training-2">https://www.linkedin.com/learning/google-ads-adwords-essential-training-2</a>
Midterm Exam	200	On D2L, 25 multiple-choice questions. Learning materials are from YouTube videos and book. <i>D2L Helpdesk 940-397-4278, e-mail: helpdesk@mwsu.edu.</i>
Final Exam	300	On D2L, 50 multiple-choice questions. Learning materials are from YouTube videos and book. <i>D2L Helpdesk 940-397-4278, e-mail: helpdesk@mwsu.edu.</i>
TOTAL	1000	

Table 2: Grade system

Percentage	Letter grade
90% +	A
90-89%	B
70-79%	C
60-69%	D
<60%	F

Please remember that grades are *earned* not negotiated and you should consistently perform well for a good grade in class. If you are having difficulties with the class come see me early on. There is not much I can do to help you improve your grade if you wait until the end of the semester.

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Table 3: Marketing Metrics videos using Gopala Ganesh Textbook

### Cases

\*(H): by hand

\*(E): by excel

MMGG Textbook Cases	YouTube link
<b>Module 1: Percentages and Weighted Average</b>	
Swaaguth Hotel (H)	<a href="https://youtu.be/TxY_pKLUqFI">Youtube link https://youtu.be/TxY_pKLUqFI</a>
<b>Module 3: Channel Markup</b>	<a href="https://youtu.be/h0z6mZ7tvVY">Youtube link https://youtu.be/h0z6mZ7tvVY</a>
Lone Star Lamp Company (H)	<a href="https://youtu.be/1p8-BFAn4Gs">Youtube link https://youtu.be/1p8-BFAn4Gs</a>
Krispy Kreme Company (H)	<a href="https://youtu.be/vQazp_yghZA">Youtube link https://youtu.be/vQazp_yghZA</a>
Western Boot Company # 1 (H)	<a href="https://youtu.be/W7BoeWguSnM">Youtube link https://youtu.be/W7BoeWguSnM</a>
Baby Magic Inc. (H)	<a href="https://youtu.be/ESS31Oj38YM">Youtube link https://youtu.be/ESS31Oj38YM</a>
<b>Module 4: Breakeven Analysis</b>	<a href="https://youtu.be/-HGswgB_MbQ">Youtube https://youtu.be/-HGswgB_MbQ</a>
Best Pizza in Town (H)	<a href="https://youtu.be/qyNhcDtkSTA">Youtube link https://youtu.be/qyNhcDtkSTA</a>
Texas Bearing Co (H)	<a href="https://youtu.be/8yZg8M8hbMM">Youtube link https://youtu.be/8yZg8M8hbMM</a>
Galaxy Music Inc (H)	<a href="https://youtu.be/G0H-US9Bxrg">Youtube link https://youtu.be/G0H-US9Bxrg</a>
Metro Manufacturing Co (H)	<a href="https://youtu.be/ciYSXeH6nZo">Youtube link https://youtu.be/ciYSXeH6nZo</a>
Athens Nurseries (H)	<a href="https://youtu.be/BrXZd_ReOHA">Youtube link https://youtu.be/BrXZd_ReOHA</a>
Hannibal Appliance Co (H)	<a href="https://youtu.be/Q5zXGeIz_2A">Youtube link https://youtu.be/Q5zXGeIz_2A</a>
<b>Creating an Excel Worksheet</b>	

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MMGG Textbook Cases	YouTube link
Busan Computer Products Inc. (H)	<a href="https://youtu.be/L3UZzO6O5oM">Youtube link https://youtu.be/L3UZzO6O5oM</a>
Busan Computer Products Inc. (E)	<a href="https://youtu.be/1L9PfJLYR_w">Youtube link https://youtu.be/1L9PfJLYR_w</a>
Busan Computer Products Inc. – How to print excel worksheet to turn in	<a href="https://youtu.be/uPP4GBAT81M">Youtube link https://youtu.be/uPP4GBAT81M</a>
Busan Computer Products Inc. BEP graph	<a href="https://youtu.be/3JZV7J5RNf8">Youtube link https://youtu.be/3JZV7J5RNf8</a>
<b>Creating PPT presentation</b> , using Busan Computer Products Inc. data	<a href="https://youtu.be/iYkicP1INj8">Youtube link https://youtu.be/iYkicP1INj8</a>
<b>Module 9: Net Present Value</b>	<a href="https://youtu.be/74SpJl-KgGI">Youtube link https://youtu.be/74SpJl-KgGI</a>
Samraat Maurya Corporation (E)	<a href="https://youtu.be/a9YU3Rqe Js">Youtube link https://youtu.be/a9YU3Rqe Js</a>
<b>Module 7: Pricing Decisions</b>	<a href="https://youtu.be/7TqY0MuTQbA">Youtube link https://youtu.be/7TqY0MuTQbA</a>
Target pricing LSLC (H)	<a href="https://youtu.be/mBcXqGcUKsU">Youtube link https://youtu.be/mBcXqGcUKsU</a>
Target pricing Printo Printers (H)	<a href="https://youtu.be/PF-qRP9Eka4">Youtube link https://youtu.be/PF-qRP9Eka4</a>
Price elasticity (H)	<a href="https://youtu.be/ZS9aVymDpzM">Youtube link https://youtu.be/ZS9aVymDpzM</a>
Shaaka for Life (E)	<a href="https://youtu.be/QHgMBg54RVM">Youtube link https://youtu.be/QHgMBg54RVM</a>
<b>Module 8: Place / Distribution Decisions</b>	<a href="https://youtu.be/c75fS-MIY5w">Youtube link https://youtu.be/c75fS-MIY5w</a>
Secure Craft Inc. (H)	<a href="https://youtu.be/WZ0fLtZOPxg">Youtube link https://youtu.be/WZ0fLtZOPxg</a>
Backyard Bonanza Inc. (H)	<a href="https://youtu.be/C7i5O8QcwoM">Youtube link https://youtu.be/C7i5O8QcwoM</a>
<b>Module 6: Promotion Decisions</b>	<a href="https://youtu.be/cbwjHXMf8CM">Youtube link https://youtu.be/cbwjHXMf8CM</a>
Wichita Super Bag Company	<a href="https://youtu.be/tboJ9oYGRuo">Youtube link https://youtu.be/tboJ9oYGRuo</a>

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MMGG Textbook Cases	YouTube link
Boulder Electronics Company	<a href="#">Work on your own</a>
Pegasus Pegasus addendum	<a href="https://youtu.be/bvRgDfxnmjM">Youtube link https://youtu.be/bvRgDfxnmjM</a> <a href="https://youtu.be/Kl-jLPoVXbs">Youtube link https://youtu.be/Kl-jLPoVXbs</a>
SmileBrite Inc.	<a href="https://youtu.be/nx5RLEabX-I">Youtube link https://youtu.be/nx5RLEabX-I</a>
Texas Grills Inc.	<a href="https://youtu.be/bM2p2e993gs">Youtube link https://youtu.be/bM2p2e993gs</a>
Lafayette Valves	<a href="https://youtu.be/AXg32Tu6VvI">Youtube link https://youtu.be/AXg32Tu6VvI</a>
Finn Fones Inc.	<a href="https://youtu.be/bAfwWvGHp2o">Youtube link https://youtu.be/bAfwWvGHp2o</a>
Promotion Cannibalization at Baja Foods Inc.	<a href="https://youtu.be/L6UybK7s59I">Youtube link https://youtu.be/L6UybK7s59I</a>
Dijon Consumer Products Incorporated	<a href="https://youtu.be/aouvsNa0Jec">Youtube link https://youtu.be/aouvsNa0Jec</a>
Promotion Cannibalization at Swaaguth Inc.	<a href="https://youtu.be/4LRYdryDIX4">Youtube link https://youtu.be/4LRYdryDIX4</a>
<b>Module 5: Product Decisions</b>	<a href="https://youtu.be/tdwV9YSHrFA">Youtube link https://youtu.be/tdwV9YSHrFA</a>
New Product Decision at Denton Delectable Delicacies	<a href="https://youtu.be/pK33tIj1RvI">Youtube link https://youtu.be/pK33tIj1RvI</a>
Lone Star Publishing Company	<a href="#">Work on your own</a>
New Product Decision at Fresno Treats Inc.	<a href="https://youtu.be/e7EdVDGBAkg">Youtube link https://youtu.be/e7EdVDGBAkg</a>
New Product Decision at Wipra	<a href="https://youtu.be/qpweAX560o4">Youtube link https://youtu.be/qpweAX560o4</a>
Product Cannibalization at Great Lakes Inc.	<a href="https://youtu.be/LttAnGMVfqq">Youtube link https://youtu.be/LttAnGMVfqq</a>
Product Cannibalization at Hannibal Co.	<a href="https://youtu.be/k50_kcPJy5w">Youtube link https://youtu.be/k50_kcPJy5w</a>
Cannibalization: Smarter Appliances Inc.	<a href="https://youtu.be/JXBh0Z6V-2o">Youtube link https://youtu.be/JXBh0Z6V-2o</a>
Product Cannibalization at Corinth Canning Company	<a href="https://youtu.be/AsCUobUxSso">Youtube link https://youtu.be/AsCUobUxSso</a>
Product Cannibalization at Arnol-D Corp	<a href="https://youtu.be/_nWwFgfQpvg">Youtube link https://youtu.be/_nWwFgfQpvg</a>

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MMGG Textbook Cases	YouTube link
Product Cannibalization at Aztec Pharma	<a href="https://youtu.be/BHJffA8OEbY">Youtube link https://youtu.be/BHJffA8OEbY</a>

## MKTG METRICS ASSIGNMENT: ZOJIRUSHI CO.

**Due date:** See syllabus

### Requirements:

1. Solve the case by hand.
2. Design Excel worksheet using data from the case.
3. Design PPT using data from the case.
4. Combine both Excel and PPT components (total 10 pages) in one PDF submission and upload to D2L dropbox. You do not need to upload the by hand solution.

### Instructions:

*Use the following YouTube videos as examples of how to do the Zojirushi case.*

[Busan case by hand https://youtu.be/L3UZzO6O5oM](https://youtu.be/L3UZzO6O5oM)

[Busan case by excel https://youtu.be/1L9PfJLYR\\_w](https://youtu.be/1L9PfJLYR_w)

[How to print Excel worksheets https://youtu.be/uPP4GBAT81M](https://youtu.be/uPP4GBAT81M)

[Busan case BEP graph https://youtu.be/3JZV7J5RNf8](https://youtu.be/3JZV7J5RNf8)

[Busan case PPT https://youtu.be/iYkicP1INj8](https://youtu.be/iYkicP1INj8)

### Excel Component:

- Create an Excel worksheet from scratch. *Please watch the videos to do it right!*
- Your organization of the worksheet data in the case must follow these guidelines:
  - Name of the case
  - Breakeven Analysis in Promotion Decisions
  - Worksheet created by YOU
  - Inputs Section
    - Information on Prices, % Volume, and Markups
    - Information on Unit Variable Costs
    - Information on Fixed Costs
    - Other Information
  - Output Section

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- Q1
  - Q2
  - ---
  - Q10
- Must sequence FIVE pages to turn in: (1) Numerical Worksheet Printout, two pages (Inputs and Outputs), (2) Formula Worksheet Printout, two pages (Inputs and Outputs), and (3) BEP graph.
  - Show grid lines and row/column headers. Header/Footer in three sections as shown in the video.
  - Your workbook should look like BCPI.xls. i.e. Text in Columns A and numbers in Column B.
  - Matching numeric and formula worksheets are required. Lack of row/column correspondence between the two will be interpreted as “unfair effort.”
  - Input only raw case information in the INPUTS section, *No calculations in numeric!*
  - Input only =formulas in the OUTPUTS section. *No numbers in formulas!, with the exception of number 1.*
  - You are required to limit the INPUTS and OUTPUTS sections of the numeric and formula worksheets to maximum 70 rows each. Please fit each section to one separate printed page.
  - Include the title block rows 1-4 on each page, as shown in the practice BCPI.xls A+V and illustrated in class.
  - Round all \$ amounts to two decimal places (e.g. \$ 23.45).
  - Round all \$ amounts less than \$1 to two decimal places (e.g. \$ 0.15)
  - Show naturally rounded information in comma format (i.e. 22 salespeople = 22 NOT 22.00!)
  - Show all percentage data with two decimal places (i.e. .78456 = 78.46%)
  - Round up #BEP and #RLS, and display in comma format, with no zeros in the decimal places.
  - Calculate \$BEP and \$RLS using the formula by multiplying #BEP and #RLS by USP

## PPT Component:

- Design a PPT from scratch..
- 5-page, 2-slides per page.
- Only 2D charts. Format all slides properly: title, axes clearly labeled with units and legend (only if needed!). DO NOT add other uncalled for enhancements!
- Subtitle ONLY for the title slide. All titles and legend items MUST fit on one line each.
- **Place the current date, mktg6663 Your Last and First Name initial and slide# in the footer of all 9 slides.**
- Color is NOT required. Print grayscale, NOT pure black and white. MUST distinguish shades clearly!

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- Remember: A bullet chart is expected to have bullets (2 lines max per bullet), not paragraphs!
- Your organization of the worksheet data in the case must follow these guidelines:
  - Slide # 1: Title slide. Fit the company name on a single line. Include a sub-title.
  - Slide # 2: State a few relevant issues, i.e., the agenda, in a brief bullet slide.
  - Slide # 3: Using a 2D simple column chart, show 3 columns: the selling price for retail, wholesaler, and Zojirushi selling price
  - Slide # 4: Using a 2D stacked (layered) chart, illustrate ZOJIRUSHI's four variable costs per unit and contribution as the top layer. If done right, the five-layer stack will rise to ZOJIRUSHI's weighted USP for a device.
  - Slide # 5: Using a 2D stacked (layered) chart, illustrate ZOJIRUSHI's four variable cost items as % sales, and %C as the top layer. If done right, the five-layer stack will rise to 100%.
  - Slide # 6: Using a 2D pie chart, illustrate ZOJIRUSHI 2020 YEN three fixed costs and 2020 YEN actual profits. Show profits as a cut-away slice. Include a legend for the chart and % for each slice of the pie. Show YEN amount also, ONLY for the profit slice.
  - Slide # 7: In a 2D clustered column chart with 3 clusters, one for each 2021 profit scenario. Each cluster should show two columns: #BEP and #RLS.
  - Slide # 8: In a 2D clustered column chart with 3 clusters, one for each 2021 profit scenario (question 8,9,10 of the case). Each cluster should show two columns: YEN BEP and YEN RLS.
  - Slide # 9: Conclude with a bullet slide, commenting on the feasibility of the three profit goal scenarios. Which is the most challenging? Which is the least? Which falls in between?

## The Case: Zojirushi

Zojirushi is a Japanese company, <https://www.zojirushi.com/>, which was created in 1918. The company is one of the top manufacturers of household products in the world. Zojirushi's success lies in the company's leverage of the latest technologies to make life more comfortable and convenient. Rice cooker is one of the eleven lines of products the company offers. Within the rice cooker product line, Zojirushi offers four types of rice cookers. The top of the line product is the Pressure + Induction Heating + Micom model, which typically costs 55,132 ¥ at retail and contributes to 10% of sales for this product line. The Induction Heating + Micom model costs 30,298.61 ¥ at retail and contributes to 30% of sales for this product line. The Micom model costs 19,373.08 ¥ to the customers and makes up 35% of sales for this product line. Finally, the conventional model costs 13,946.55 ¥ to the customers and makes up 25% of sales for this product line. The wholesaler markup on the manufacturing price is 25%, and the retailer markup on the customer cost is 40%. The material and labor costs for Zojirushi are as follows:

Product category	Materials	Labor
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# SPECIAL TOPICS IN MKTG

Pressure + Induction Heating + Micom	8,500 ¥	6,340 ¥
Induction Heating + Micom	4,030 ¥	4,350 ¥
Micom	2,505 ¥	3,020 ¥
Conventional	2,102 ¥	2,800 ¥

The shipping and packaging cost is the same for all four models and costs 1,000 ¥. The manufacturer has its own sales force to sell to the wholesalers. The salesforce is compensated 4% for each unit sold. In order to run efficiently, all four product categories using the same manufacturing facility. The annual production costs for this product line in Japan is 14,000,000 ¥. The annual salary of a salesperson is 5,000,000 ¥. The company has four salespeople responsible for this product line, and one sales manager, whose annual salary is 6,000,000. The initial investment to set up the production line is 50,000,000 ¥. In 2020, the Japanese market has bought a total of 100,000 units. The company forecasts an increase of 10% in 2021 for the industry and expects to take up 35% of the market share.

Zojirushi management team has set up three profit goals for 2021: (1) profit of 50,000,000 ¥, (2) 35% ROI on the initial investment, (3) 20% profit on sales. In order to achieve 2021 profit goals, the company plans to spend ¥2,000,000 on each tradeshow quarterly. In each scenario, the management team would like to know the number of units and revenue the company must sell in order to achieve the profit goals.

- Q1: What is weighted selling price per unit for retailers, wholesalers, and Zojirushi?  
 Q2: What is Zojirushi's weighted selling price per unit using markeup chain?  
 Q3: What is Zojirushi's unit variable cost?  
 Q4: What are Zojirushi's ¥ and % contributions?  
 Q5: What is Zojirushi's total fixed cost in 2020? Be sure to itemize all the fixed costs.  
 Q6: What is Zojirushi's total fixed cost in 2021?  
 Q7: What are Zojirushi's #BEP and ¥BEP in 2020?  
 Q8: What are the # RLS and ¥RLS for profit goal 1?  
 Q9: What are the # RLS and ¥RLS for profit goal 2?  
 Q10: What are the # RLS and ¥RLS for profit goal 3?  
 Q11: What are the size of the industry market in units, company's market shares in 2020 and all three profit goals scenarios in 2021?

**Professor's Partial Excel Hint answers:**

**Q8: Yen RLS 354,212,445.84**

**Q9: #RLS = 19,832**

**Q10: Yen RLS = Yen 626,019,643.84**

*You must match these answers exactly!*

**IMPORTANT:**

**must use =roundup function for calculating every #BEP and #RLS.**

**Calculate YEN BEP as #BEP\*USP and YEN RLS=#RLS\*USP.**

# SPECIAL TOPICS IN MKTG

**Grading Rubric:**

Criterion	No problem	Some problem	Big problem	Very big problem
<b>Excel Component</b>				
Numeric Inputs: no formulas, correctly organize data by type of info with headers				
Numeric Outputs: organize and itemize correctly by questions				
Nummeric Outputs: correctly answer all 10 questions				
Numeric Outputs: Exactly match the “Professor Hints” for Q 10				
Matching formula inputs				
Matching formula outputs and no numbers in formula				
Q2 Use markup chain				
Cell formatting (\$ with 2 decimals, % with 2 decimals, comma with no decimals, and <i>roundup</i> use)				
Print formatting: grid lines, row-column headers, centered worksheet, header-footer, rows 1-4 repeat on all 4 worksheet pages (title block), columns A&B not cut off				
Correct BEP graph: include values.				
<b>PPT Component</b>				
PDF has exactly 5 pages, 2 slides per page, no missing nor extra slides				

# SPECIAL TOPICS IN MKTG

Criterion	No problem	Some problem	Big problem	Very big problem
<b>Excel Component</b>				
Correct 2D slides and pie chart, and stacked/layered chart				
No numerical mistakes in slides				
Formatting: legend, title, footer requirement, XY axes				
<b>Submission</b>				
PDF submission and correct sequences: numeric inputs & outputs, formula inputs & outputs, BEP graph, 5 PPT pages.				

# SPECIAL TOPICS IN MKTG

TABLE 3: TENTATIVE SCHEDULE

#	Date	MMGG module	MMGG Module	MBTN schedules and course assignments due dates
1	8.24	Percentages and Weighted Average	1	<a href="https://www.mbtn.academy/">MBTN link https://www.mbtn.academy/</a> Advertising metrics
2	8.26	Percentages and Weighted Average	1	Advertising metrics
3	8.31	Channel Markups	3	Web metrics
4	9.2	Channel Markups	3	Web metrics
5	9.7	Channel Markups	3	<i>AM certificate attempt 1</i> <b>(each attempt must be at least 3 days apart. You can certainly start attempt prior to this day. You must complete the exercises at 100% before you can begin your attempts. You have a total of 4 attempts)</b>
6	9.9	Contribution and Breakeven Analyses	4	Customer Lifetime Value 1
7	9.10	Contribution and Breakeven Analyses	4	Customer Lifetime Value 1
8	9.14	Contribution and Breakeven Analyses	4	Customer Lifetime Value 2
9	9.16	Product Decisions	5	Customer Lifetime Value 2
10	9.21	Product Decisions	5	<i>CLV certificate attempt 1</i>
11	9.23	<i>Midterm Exam</i>	MMGG 3,4,5	<i>Cover the MMGG materials only</i>
12	9.28	Net Present Value	9	
13	9.30	Net Present Value	9	
14	10.5	Price Decisions	7	
15	10.7	Price Decisions	7	<i>All LinkedIn certificates due at 11:30 pm on D2L</i>
16	10.12	Place Decisions	8	
17	10.14	Place Decisions	8	
18	10.19	Promotion Decisions	6	
19	10.21	Promotion Decisions	6	
20	10.26	Promotion Decisions	6	
21	10.29	Review		<i>MMGG project due at 11:30 pm on D2L</i> <i>Be sure to watch the videos on creating Excel worksheet and PPT presentations posted in Table 3 to do this project.</i>
22	10.28	Review		
23	11.2	Review		<i>All MBTN certificates due @ 11:30 pm on D2L</i>
24	12.4	<i>Final exam</i>	MMGG 1-9	<i>MMGG materials only - Comprehensive exam @D2L</i>