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| https://research.nvidia.com/sites/default/files/image/UT Tyler Logo - Web.jpg | **THE UNIVERSITY OF TEXAS AT TYLER** College of Business and Technology |
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**Fall 2015**

**MARK 4340.001 Business Analytics**

**Category Management Certification Program**

Classroom | T/TH pm

**INSTRUCTOR INFORMATION**

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| Name: Dr. Kay Byun (PhD, MBA, MA)  Office: BUS 143A  Office Hours: W 10 - 3 pm  Tel: (903) 565-5694 e-mail: [kbyun@uttyler.edu](mailto:kbyun@uttyler.edu) (primary) |

**COURSE INFORMATION**

**Course Description**

Industry overview, highlighting a variety of critical retail metrics. Focus will be on how those metrics are derived and their implications. The course will utilize technology to gain experience with the development of the various metrics. To enhance the understanding of the use of data in making retailing decisions, participation in a retail data analysis will be required.

**Certified Professional Category Analyst (CPCA)**

This course contains on-line certificate modules provided by Learning Evolutions which form the foundation for final certification as a Certified Professional Category Analyst.

These modules provide students with additional identifiable skills which add value to their degree plan and are highly sought after by employers. While each module in the program costs in excess of $125.00, students have been provided a scholarship through the College of Business and Technology which provides them access at **NO CHARGE!**

The professional category analyst program solidifies category knowledge and lays the foundation for success in the category management field by emphasizing industry knowledge, history and basic data analysis. CPCA’s develop the skills and category expertise to establish themselves as front-line resources for retailers and manufacturers. At this level, certified professionals will have worked with retail point-of-sale (POS) and syndicated scanner data. CPCA’s will have examined pricing, promotion and assortment analysis and explored space planning software and relational databases. Career options benefiting from CPCA knowledge include (but are not limited to); sales, business unit assistants and managers, category development managers, customer managers, retail and insights analysts.

In particular, this course provides two modules of the Category Certification Programs, including **Promotion Analysis**, **Syndicated Scanner Data (Basic)**, and **Retailer POS Data Analysis (Basic)**. Students are required to take the modules, including a pre-test, a content module, and a post-test. **Once a post-test score is more than 80%, students will obtain a certificate for each module**.

**Prerequisites**

**MARK 3311 (Principles of Marketing)** - Any student not meeting prerequisites will be administratively withdrawn from the class.

**Required Textbook & Course Materials**

**TEXTBOOK:**  **Marketing Metrics (2nd Ed.)**

by Paul Farris, Neil Bendle, Phil Pfeifer and David Reibstein

**Management-By-The-Number Marketing Modules** accessible at: <http://www.management-by-the-numbers.com/>

**Certified Professional Category Analyst Certification Modules**:

* CPCA Promotion Analysis 2010 (Basic) v 1.5
* CPCA Syndicated Scanner Data Analysis 2010 (Basic) v 1.5
* CPCA Retailer POS Data Analysis 2010 (Basic) v 1.5

## Access to Course Materials

You can access course materials through BLACKBOARD (<http://blackboard.uttyler.edu>). Throughout the semester, students will participate in quizzes and activities on BB as requested by the instructor.

You also need to access both MBTN modules and CPCA modules in order to complete the course successfully. For the access to the MBTN modules, click <http://www.management-by-the-numbers.com/>. For the CMA certification modules, please visit <http://catman.learningevolution.com/look/su/loginhtml.asp?v=su>. Procedures to access to the Category Management certification learning modules will be provided separately with more details.

**Course Objectives / Expected Learning Outcomes**

This course is designed to promote student knowledge in the following areas:

* Concepts of retail data analysis
* Role of Key Performance Metrics (KPI’s) in retailing, including margins and breakeven analysis, Customer Lifetime Value metrics, Market Share metrics, Pricing analysis, Promotion analysis, Syndicated scanner data analysis (IRI), and Retail Point-of-sale (POS) data analysis
* Top retailers’ performance practices and metrics
* Familiarity in the generation of data for use in analysis using industry data and industry software
* Critical thinking skill development associated with retail data
* Mastery of Category Management areas including promotion analysis, syndicated scanner data, retailer POS data analysis, through in class lecture and on-line modules.

**Student outcomes:**

* Thorough knowledge of category management topics covered through exams, assignments, module completion and certificate printing.

**COURSE SCHEDULE**

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|  | **Topic** | **Chapter** | **Due** |
| 8/25 (TU) | Course Introduction |  |  |
| 8/27 (TH) | Introduction to Business Analytics |  |  |
| 9/1 (TU) | Basic Marketing Metrics: Margin/Breakeven | MBTN | Calculating Margins |
| 9/3 (TH) | Basic Marketing Metrics: Margin/Breakeven | MBTN | Breakeven Analysis |
| 9/8 (TU) | Market Share Analysis | MBTN | Market Share Metrics I |
| 9/10 (TH) | Product Positioning | Ch 4, MBTN | Conjoint Analysis |
| 9/15 (TU) | Product Positioning | Ch 4, MBTN | Perceptual Mapping |
| 9/17 (TH) | Consumer loyalty | Ch 2, MBTN | Consumer loyalty |
| 9/22 (TU) | Customer Lifetime Value Analysis | Ch 5, MBTN | CLV I |
| 9/24 (TH) | Pricing analysis | Ch 7, MBTN | Pricing I |
| **9/29 (TU)** | **EXAM 1** |  |  |
| 10/1 (TH) | Promotion metrics | Ch 8, MBTN | Promotion Profitability |
| 10/6 (TU) | Advertising Metrics | Ch 9, MBTN | Advertising Metrics |
| 10/8 (TH) | Promotion analysis | **CPCA** |  |
| 10/13 (TU) | Promotion analysis | Lab |  |
| 10/15 (TH) | Promotion analysis | **Assignment** |  |
| **10/20 (TU)** | **EXAM 2** |  |  |
| 10/22(TH) | Syndicated scanner data analysis | **CPCA** |  |
| 10/27 (TU) | Syndicated scanner data analysis | Lab |  |
| 10/29 (TH) | Syndicated scanner data analysis | Lab |  |
| 11/3 (TU) | Syndicated scanner data analysis | **Assignment** |  |
| 11/5 (TH) | Retail POS data analysis | **CPCA** |  |
| 11/10 (TU) | Retail POS data analysis | Lab |  |
| 11/12 (TH) | Retail POS data analysis | Lab |  |
| 11/17 (TU) | Retail POS data analysis | **Assignment** |  |
| 11/19 (TH) | Combining Syndicated scanner data & Retail POS data analysis | Lab |  |
| **11/24 (TU) & 11/26 (TH)** | **No Class: Thanksgiving Break** |  |  |
| 12/1 (TU) | EX3 Simulation |  |  |
| **12/3 (TH)** | **EXAM 3** |  | **CPCA Module Completion Due** |

**Changes to the syllabus:** The course syllabus is a general plan for the course; deviations announced to the class by the instructor may be necessary. **You are responsible for keeping up with all quizzes and project dues.**

**GRADING POLICIES**

**Grading Scale**

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| --- | --- | --- |
| **Evaluation Items** | **Scores** | |
| **Exam 1** | | \_\_\_\_\_\_\_\_ (100 points) |
| **Exam 2** | | \_\_\_\_\_\_\_\_ (100 points) |
| **Exam 3** | | \_\_\_\_\_\_\_\_ (100 points) |
| **TOTAL EXAM** | | **\_\_\_\_\_\_\_\_ (300 points)** |
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| **CPCA MODULE Completion (50 pnt@3)** | | **\_\_\_\_\_\_\_\_ (150 points)** |
|  | |  |
| **MBTN Modules ( 20 pnt @10)** | | **\_\_\_\_\_\_\_\_ (200 points)** |
|  | |  |
| **In-Class Assignment (40 pnt @3)** | | **\_\_\_\_\_\_\_\_ (120 points)** |
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| **Class Activity** | | **\_\_\_\_\_\_\_\_ (100 points)** |
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| **TOTAL** | | **\_\_\_\_\_\_\_\_ (870 points)** |
|  | |  |
| **Extra Bonus Points** | |  |
| **Attendance Bonus** | | **\_\_\_\_\_\_\_\_ (30 points)** |
| **Penalty** | |  |
| **Incompletion of CMA Modules (-30 pnt @3)** | | **\_\_\_\_\_\_\_\_ (-90 points)** |

**Letter Grade Assignment**

The final grade will be determined as follows:

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| 780 or above | = A |
| 690-779 | = B |
| 500-689 | = C |
| 400-499 | = D |
| Under 400 | = F |

**Note: The instructor RESERVES the right to change the grading scheme and/or specific grading requirements with appropriate notice.**

**Exam (300 points)**: There will be 3 exams throughout the semester. Each exam will be counted as 100 points. **No makeup** will be given unless a document for excuse is submitted to the instructor (ex. doctor’s notes). There is NO CURVE on exam grades.

**CPCA Modules (150 points):** Students should take **THREE** modules for the Category Management Certification. For each module, students are required to take a pre-test, a content module, and a post-test. Once the post-test score is **more than 80%,** then a student will get a certification of completing successfully a corresponding module. For completion of each module, 50 points will be given. However, **when a student FAILS to pass the post-test, then there will be a PENALTY as a 30-point deduction per each module**. All modules should be completed by Dec. 3, midnight.

**MBTN Modules (200 points):** Students should solve problem sets of **TEN** modules at Management-By-The-Number ([MBTN](http://www.management-by-the-numbers.com/)) throughout the semester. Each module MUST be completed WITHIN two weeks after the topic is covered. Each module contains 4 problems sets, of which each has 4-5 questions. In other words, each module has about 20 questions. Once all problem sets are completed, 20 points will be given per each module completion.

**InClass Assignment (120 points)**: There will be 3 assignments in class throughout the semester for data analysis, including promotion analysis, syndicated scanner data analysis, and retailer Point-of-Sale (POS) data analysis. Each assignment will be counted as 40 points.

## Class Activities (100 points): In this class, it is critical to have an effective communication between the instructor and students or among students. Students are required to participate in class discussions anytime when such activities are conducted. Your absence will automatically result in a lower grade than others.

**ATTENDANCE POLICIES**

**If you miss EIGHT classes or more in the semester, you will get an ‘F’ as your final grade.**

**If you miss THREE or fewer, you will earn extra 30 points to your final score.**

If you are absent due to health reasons or job interview (proper documents required), your absence will not be counted towards the eight-absence policy.

**Student Absence due to Religious Observance**

Students who anticipate being absent from class due to a religious observance are requested to inform the instructor of such absences by the second class meeting of the semester.

**Student Absence for University-Sponsored Events and Activities**

If you intend to be absent for a university-sponsored event or activity, you (or the event sponsor) must notify the instructor at least two weeks prior to the date of the planned absence. At that time the instructor will set a date and time when make-up assignments will be completed.

## COURSE POLICIES

**Expectations of Students: I expect you to:**

* Present at all class sessions and activities
* Have read the assigned material prior to starting each session
* Take a quiz after each session
* Spend at least **4-5 hours** weekly on the covered material
* Be punctual to keep up assignments and project dues
* Do not use cell phones or lap tops in class for personal use such as texting, facebooking, searching, etc. **Whenever you are caught, you will have a 50-point deduction from the total points. No exception.**

**Expectations of the instructor: You can expect me to:**

* Provide all necessary class materials on time every week
* Keep challenging you every class
* Provide scheduled office hours
* Provide an ongoing help forum throughout the semester
* Create quizzes and exams that reflect the stated learning expectations for the course
* Do my best to get you to appreciate and enjoy marketing research

**Build Rapport**

If you find that you have any trouble keeping up with assignments or other aspects of the course, make sure you let your instructor know as early as possible. As you will find, building rapport and effective relationships are key to becoming an effective professional. Make sure that you are proactive in informing your instructor when difficulties arise during the semester so that we can help you find a solution.

**College of Business Statement of Ethics:**

The ethical problems facing local, national and global business communities are an ever-increasing challenge. It is essential t he College of Business and Technology help student s prepare for lives of personal integrity, responsible citizenship, and public service. In order to accomplish these goals, both student s and faculty of the College of Business and Technology at The University of Texas at Tyler will:

* Ensure honesty in all behavior, never cheating or knowingly giving false information.
* Create an atmosphere of mutual respect for all students and faculty regardless of race, creed, gender, age or religion.
* Develop any environment conductive to learning.
* Encourage and support student organizations and activities.
* Protect property and personal information from theft, damage and misuse.
* Conduct yourself in a professional manner both on and off campus.

**Academic Dishonesty Statement**

The faculty expects from its students a high level of responsibility and academic honesty. Because the value of an academic degree depends upon the absolute integrity of the work done by the student for that degree, it is imperative that a student demonstrates a high standard of individual honor in his or her scholastic work.

Scholastic dishonesty includes, but is not limited to, statements, acts or omissions related to applications for enrollment of the award of a degree, and/or the submission, as one’s own work of material that is not one’s own. As a general rule, scholastic dishonesty involves one of the following acts: cheating, plagiarism, collusion and/or falsifying academic records. Students suspected of academic dishonesty are subject to disciplinary proceedings.

University regulations require the instructor to report all suspected cases of academic dishonesty to the Dean of Students for disciplinary action. In the event disciplinary measures are imposed on the student, it becomes part of the students’ official school records. Also, please note that the handbook obligates you to report all observed cases of academic dishonesty to the instructor.

**Grade Replacement/Forgiveness and Census Date Policies**

Students repeating a course for grade forgiveness (grade replacement) must file a Grade Replacement Contract with the Enrollment Services Center (ADM 230) on or before the Census Date of the semester in which the course will be repeated. Grade Replacement Contracts are available in the Enrollment Services Center or at http://www.uttyler.edu/registrar.

Each semester’s Census Date can be found on the Contract itself, on the Academic Calendar, or in the information pamphlets published each semester by the Office of the Registrar. Failure to file a Grade Replacement Contract will result in both the original and repeated grade being used to calculate your overall grade point average. Undergraduates are eligible to exercise grade replacement for only three course repeats during their career at UT Tyler; graduates are eligible for two grade replacements. Full policy details are printed on each Grade Replacement Contract.

The Census Date is the deadline for many forms and enrollment actions that students need to be aware of. These include:

* Submitting Grade Replacement Contracts, Transient Forms, requests to withhold directory information, approvals for taking courses as Audit, Pass/Fail or Credit/No Credit.
* Receiving 100% refunds for partial withdrawals. (There is no refund for these after the Census Date)
* Schedule adjustments (section changes, adding a new class, dropping without a “W” grade)
* Being reinstated or re-enrolled in classes after being dropped for non-payment
* Completing the process for tuition exemptions or waivers through Financial Aid

**State-Mandated Course Drop Policy**

Texas law prohibits a student who began college for the first time in Fall 2007 or thereafter from dropping more than six courses during their entire undergraduate career. This includes courses dropped at another 2-year or 4-year Texas public college or university. For purposes of this rule, a dropped course is any course that is dropped after the census date (See Academic Calendar for the specific date).

Exceptions to the 6-drop rule may be found in the catalog. Petitions for exemptions must be submitted to the Enrollment Services Center and must be accompanied by documentation of the extenuating circumstance. Please contact the Enrollment Services Center if you have any questions.

**Disability Accommodation**

Any student who feels their performance in this class may be impacted by a disability, in accordance with federal law, must provide documentation of his/her disability. It is university policy to evaluate the need for an accommodation on a case by case basis. In accordance with Section 504 of the Rehabilitation Act, Americans with Disabilities Act (ADA) and the ADA Amendments Act (ADAAA) the University offers accommodations to students with learning, physical and/or psychiatric disabilities. If you have a disability, including non-visible disabilities such as chronic diseases, learning disabilities, head injury, PTSD or ADHD, or you have a history of modifications or accommodations in a previous educational environment you are encouraged to contact the Student Accessibility and Resources office and schedule an interview with the Accessibility Case Manager/ADA Coordinator, Cynthia Lowery Staples. If you are unsure if the above criteria applies to you, but have questions or concerns please contact the SAR office. For more information or to set up an appointment please visit the SAR office located in the University Center, Room 3150 or call 903.566.7079. You may also send an email to [cstaples@uttyler.edu](mailto:cstaples@uttyler.edu)

**SOCIAL SECURITY AND FERPA STATEMENT:**

It is the policy of The University of Texas at Tyler to protect the confidential nature of social security numbers. The university issues a unique identifying ID number to all students. The electronic transmission of grades (e.g., email) risks violation of the Family Educational Rights and Privacy Act (FERPA) and therefore will not be transmitted electronically. Further, in accordance with FERPA, any information regarding assignments and grading will be discussed between the instructor and the student only. All requests made to the instructor, which are initiated by someone other than the student, regarding information about a student’s activity, will be advised by the instructor to seek that information from the student.

Emergency Exits and Evacuation:

Everyone is required to exit the building when a fire alarm goes off. Follow your instructor’s directions regarding the appropriate exit. If you require assistance during an evacuation, inform your instructor in the first week of class. Do not re-enter the building unless given permission by University Police, Fire department, or Fire Prevention Services.

**Technical Support**

**Learning Evolutions**

If you experience technical problems or have a technical question about the modules contained in this course, you can obtain assistance by emailing [support@learningevolution.com](mailto:support@learningevolution.com)

When you email Support, be sure to include a complete description of your question or problem including:

* The title and number of the course
* The module in question
* If you get an error message, a description and message number
* What you were doing at the time you got the error message

**Category Management Online Modules**

Refer to assignment instructions posted in the Assignments section of Blackboard. You will need to demonstrate that you successfully completed the module by producing a copy of the certificate of completion from Learning Evolution. You will be provided the certificate if you achieved an 80% or higher score on the posttest. We will verify your score directly from Learning Evolutions. The TA for this course is responsible for all questions and grading of the Learning Evolutions modules and the TA can assist you in your completion of these assignments. If you still have questions or concerns after you have worked with my TA on these assignments, please contact me. You ARE permitted to work with other students to facilitate learning, however you must complete each assignment yourself.