

Enhancing the Linkage of Learning Objectives to Learning Outcomes for Marketing

Tyrone W. Jackson
California State University, Los Angeles

Academics and students are concerned on what is taught in the classroom and not on the desired learning outcome. This problem is exacerbated with professors assuming skills taught are retained. To ensure skills are retained, studies have shown the simulation method has a greater chance of success. This paper will discuss the steps involved a direct marketing campaign, when taught in a simulation, teach core marketing skills and the desired learning outcomes sought for marketing learning objectives. A structured approach simulation marketing campaign is discussed to instill strategizing, planning, executing, and measuring, which have universal application to careers in marketing.

INTRODUCTION

Throughout the college years, students move from one marketing course to another with professors assuming and expecting that skills taught are retained. Marketing courses teach students a myriad of skills to college students. However, as students move from one marketing course to another, retention of skills learned previously is assumed and passively assessed via traditional measures of tests, assignments, and presentations. How do we, as academicians, really know if students are acquiring and retaining the necessary skills to be effective marketers in their careers? Students may learn material for the final exam of a prerequisite class but then forget it as knowledge depreciates over time (Kipps & Kohen, 1984).

Teachers typically use grades to assess the outcome of their learning expectations; however, accrediting bodies typically require a more in depth analysis of learning outcomes. Marketing programs at colleges and universities must ask themselves how a particular marketing course prepares a student for a career in marketing. However, before students are taking major marketing courses, they are required to pass the general education and business core courses. These courses are designed to prepare students for upper level work (Carlson et al., 2002). If the desired outcome of the prerequisite and core business courses is achieved, then upper-level faculty can safely assume that students have a core competency of the basic business subjects and writing, meaning that they don't need to waste time re-teaching this material. The question remains do we really know if students are acquiring and retaining the necessary skills to be effective marketers in their careers?

Suppose, the concepts were taught in a simulation, would students retain them better so that they can be applied beyond the classroom? Studies suggest that students benefit from role-play simulations in acquiring skills (DeNeve & Heppner, 2005). In addition, simulations increase skills retention (Bonham, 2008). In the context of marketing, a prime candidate for a simulation would be the execution of a direct marketing campaign for a company (Chakraborty & Nowak, 1998). Since most students matriculate and enter the professional world where a team environment is highly likely, a group project for this simulation

is realistic. Students would benefit from the core marketing skills taught. Given the structured approach, team and other “real world” aspects, students would not too soon forget the experience. Academicians can test students’ retention by having them apply the direct marketing skills learned to “perceived” non-marketing areas; this is a “truer” test of retention for example, the job search process. In general, students perceive job search (i.e., full-time/part-time employment, internships) as non-marketing related. In reality, job search is very much about marketing; it is about marketing oneself as opposed to marketing a company’s products and services, which is the focus of most courses and textbooks.

The purpose of this paper is to demonstrate that the core marketing skills involved in developing a successful direct marketing campaign using a simulation can be applied to a “real world”, personal, and near-term scenario of seeking employment. As such, this direct marketing simulation project could be given to an undergraduate class comprised primarily of juniors and seniors or a graduate student with more in-depth applications. This paper focuses on the use of a direct marketing (DM) campaign for expository purposes and can be extended to other types of marketing campaigns, e.g., interactive, web, etc.

MARKETING LEARNING OBJECTIVES

The problems of marketing curriculum and the shortsighted views of academics and students alike are challenged during accreditation from AACSB. With the AACSB raising their expectation of learning outcomes for business courses marketing programs will face additional challenges (Doyle & Wood, 2005).

Undergraduate business students are expected to accomplish the following learning outcomes by understanding the current issues and challenges with the intention of anticipating and understanding emerging future business challenges (AACSB, 2007).

- Business knowledge – Students will be able to describe the basic functions of business - accounting, marketing, management, finance, international business, and quantitative analysis
- Critical Thinking - Students are able to identify business problems, research and analyze those problems and make sound business decisions
- Communication – Students are able to demonstrate leadership and communication skills (oral and written) and exhibit professional behavior
- Ethics - Students will be able to recognize, analyze and choose resolution to ethical problems explicit or implicit in decision making
- Leadership – Students will demonstrate business leadership and decision-making skills necessary to be effective managers
- Technology – To identify and use the most appropriate technology in decision-making and improving personal productivity

After researching sixty-three AACSB accredited business schools the common learning objectives for marketing listed were:

- Explain and describe the functional areas of marketing
- Use and integrate the concepts of marketing and core business knowledge to solve marketing problems and issues
- Analyze markets and identify appropriate segmentation criteria to discover promising market niches
- Develop an effective marketing strategy, including a marketing mix, for a product/service
- Utilize technology to facilitate and enhance the accessing, reporting and critical analysis of market research information to improve the timing, accuracy, and quality of enterprise decision-making

- Employ analytical problem-solving skills, and ethical decision-making techniques to resolve complex marketing issues within the context of the internal enterprise structures and external institutional requirements
- Understand competitive advantage and positioning, interpretation and analysis of market data
- Awareness of the linkages between firm internal operational decisions and the external environment
- Understand fundamental marketing research concepts, procedures and applications and their application in a business context; and be capable of undertaking a marketing research project, from design, through analysis to report generation and presentation
- Identify and explain the consumer decision process and factors that influence this decision process and be capable of applying this knowledge to marketing campaigns and strategies
- Assess the information needed to identify and select target markets

These marketing objectives comprise many of the needed skills that can be utilized in business when conducting a marketing campaign.

APPROACH TO LINK LEARNING OBJECTIVES TO LEARNING OUTCOMES

Learning objectives can be classified as changing of knowledge, attitudes, or behavior. I believe that management schools should focus on behavioral change (skill training). To identify learning objectives, one should start with skills needed to perform the relevant business tasks (e.g., how do I manage a marketing campaign?). The next tasks can identify techniques that can be used to develop skills (e.g., time lines). The following steps are to search for exercises that will allow students to use these techniques (e.g., prepare a marketing campaign). Finally, students can be required to monitor their success in mastering techniques. Marketing simulation concepts specifically of a marketing campaign mapped to a real world experience such as career goals (e.g. finding a job, applying for a graduate program, etc.) provide the necessary skills for students to achieve the marketing learning outcomes.

Simulation Concepts

The simulation requires students to follow a structured process utilized in direct marketing. Students are review the concepts of a direct marketing campaign. The students work through a real-world case to see the application of direct marketing. Students then apply the direct marketing structured process in a team project in simulated setting. Then the students apply the same structured direct marketing process to a personal goal. The structure steps and objectives used in the simulation are as follows:

Direct Marketing (DM) – Direct marketing refers to a company’s direct communication with consumers / customers focused on eliciting responses to offers for its products and services (e.g., purchases) via a process that is tracked and measured. This process requires an understanding of diverse marketing concepts and builds upon multiple marketing courses.

Simulation Objectives

1. Objective #1: Students will learn the key steps in a direct marketing campaign.
 - i. Students will understand direct marketing and its benefits.
 - ii. Students will be exposed to the steps involved in a direct marketing campaign
 - iii. Students will learn how a direct marketing campaign is used in business while studying a case study.
2. Objective #2: Students can work individually or in teams to conduct a direct marketing campaign.
3. Objective #3: Students will apply what they learned in the direct marketing campaign project and work individually to a “real world”, personal, and near-term scenario to implement a plan to

obtain employment. Some examples of individual career goals you can apply this simulation to are:

- i. applying for graduate or some other professional school,
- ii. applying for a career job such as: job after graduation, internship/externship or
- iii. a career transition into a new career job opportunity.

COURSE STRUCTURE

The direct marketing campaign project was presented in an undergraduate marketing course titled High Performance Professional Skills at California State University, Los Angeles in the College of Business and Economics. The course is offered every quarter. Some quarters offer two sections of the course per quarter. The average enrollment for course is 30 students. The course is required for all marketing majors. However, other business majors as well as non-business liberal arts majors have taken the course based upon its popularity. The majority of the students enrolled in the course are juniors and seniors having already been exposed to basic business courses of: accounting, computer information systems, economics, finance, management and marketing. The project is introduced at the beginning of the course and students are expected to work on the project throughout the course. While some students do not necessarily complete the individual career goals at the ending of the course their progress to their career goal is reviewed and documented and provides a basis for the attaining the learning objectives for the project. Students report their results after the course has completed which allows tracking of their career goal as well as the effectiveness and the retention of marketing skills. There are three primary learning objectives for the direct marketing campaign project.

Objective #1: Gain Knowledge of a Direct Marketing Campaign

Students are first presented with an understanding of direct marketing and its benefits to businesses ranging from large, medium and small companies. A review of direct marketing so students will be able to understand the following:

- How direct marketing allows businesses to communicate straight to the customer?
- How direct marketing messages emphasize a focus on the customer, data, and accountability?
- How direct marketing techniques are usually marked by driving a particular "call to action," which is a core principle of successful advertising?
- How direct marketing focuses a great deal on actionable and measurable outcomes that produce positive responses from consumers?

Various marketers vary on the number of steps in a direct marketing campaign. Some marketers have five, seven, eight, and as much as twelve steps used in direct marketing campaigns. Students were presented with ten steps for a direct marketing campaign to provide sufficient detail and clarity of the steps especially given their lack of practical awareness of direct marketing campaigns. The ten key steps of a direct marketing campaign students are taught are:

- (1) Develop the Direct Marketing strategy and specific campaign objective
- (2) Define the target audience
- (3) List the major steps in the plan
- (4) Set a completion date
- (5) Determine the budget
- (6) Determine the expected outcome
- (7) Design the offer/collateral
- (8) Develop the target list
- (9) Launch the Direct Marketing campaign
- (10) Measure the results

The students are then presented with a “real case study” of how effective direct marketing campaigns can be used in a business context. There are various case studies available to present direct marketing campaigns. One of the more effective case studies is the Charles Schwab “Talk to Chuck Campaign” (see Figure 1). Charles Schwab is a very prominent brokerage company. Schwab manages some \$1.6 trillion in assets for nearly 10 million individual and institutional clients. Traders can access its services via telephone, wireless device, the Internet, and through more than 300 offices in some 45 states, plus London and Hong Kong. Besides discount brokerage, the firm offers financial research, advice, and planning; investment management; retirement and employee compensation plans; and about 70 proprietary Schwab and Laudus mutual funds (Hoovers, 2011). Students work through the case to understand and answer the questions of: why was a direct marketing campaign used, when to use a direct marketing campaign, what were the processes (i.e., key steps) in executing a direct marketing campaign, and how successful (i.e., measurement) was the direct marketing campaign.

Students are asked to identify in the case, how the company Charles Schwab applied the direct marketing campaign to the “Talk to Chuck” campaign. A key message and collateral depicted in the case was the effective branding of the ‘rotoscoping’ image for the campaign depicted below.

FIGURE 1
HARVARD BUSINESS REVIEW CASE, “TALK TO CHUCK”



Students were then asked to compare and then match the steps used in the “Talk to Chuck” campaign by Charles Schwab to the ten steps in a traditional direct marketing campaign. The students identified ten steps involved in the “Talk to Chuck” direct marketing campaign despite the different labels used in the case and were successful in matching them to the steps involved in a traditional direct marketing campaign.

Objective #2: Conduct a Direct Marketing Campaign

The steps to follow provide a structured approach to conducting a DM campaign.

1. Develop the DM strategy and specific campaign objective – Determine the overall DM marketing strategy for the company, conduct market research, assess the company’s strengths, weaknesses, opportunities, and threats (SWOT). Develop the objective for the specific DM campaign (e.g., acquisition, conversion, lead generation, etc.). The objective should be clear and quantifiable

(e.g., 300 visits to the store to redeem a coupon; upsell new products to 250 users of old products; have 100 people download a new tool from the website, etc.). Determine the specific DM campaign's core message.

DM skills applied: strategy development; market research; SWOT analysis; customer acquisition, growth, and retention strategies.

2. Define the target audience – List the attributes of the typical customer the specific DM campaign is targeting, including psycho-demographics and other criteria. Build a target profile.

DM skills applied: customer segmentation and modeling (e.g., database marketing and data mining).

3. List the major steps in the plan – Define the major steps to execute the specific DM campaign. In example, the major steps for a multi-channel DM campaign (e.g., mail, web, phone) could be:

- | | |
|--|--|
| (1) Channel selection | (5) Postage |
| (2) Creative development (art/copy) | (6) Business reply (card/email confirmation) |
| (3) Production/printing | (7) Name Change of Address (NCOA) process |
| (4) Direct mail/email list development | (8) Fulfillment |

For large projects, organizing these steps into components will help avoid being overwhelmed with too many steps to manage.

DM skills applied: project planning.

4. Set a completion date – Set an end date in order to provide a timeline to achieving the objective of the specific DM campaign. For large projects, defining milestones, setting dates for these milestones, and managing to milestone dates will help avoid being overwhelmed with a long time horizon.

DM skills applied: project planning, marketing calendar development.

5. Determine the budget – Determine and manage the project budget by organizing the specific DM campaign into components. Building on the example in #3 above, the components could be: (i) total budget; (ii) creative development; (iii) production/printing; (iv) direct mail/email lists; (v) business reply charges.

DM skills applied: project management, budgeting, and vendor management.

6. Determine the expected outcome – Determine the expected outcome of the specific DM campaign. This can be used for comparison against actual results. Sample metrics could be:

- Expected number of responses
- Cost per response
- Return on investment

Metrics can be used to make adjustments during the campaign or in the next campaign (i.e., test and learn approach).

DM skills applied: impact analysis of marketing to company financials and profitability, what-if sensitivity analysis and scenarios.

7. Design the offer/collateral – Develop an offer/collateral that motivates the target audience to respond immediately to the specific DM campaign. The offer needs to be attractive, compelling, and easy to understand.

DM skills applied: value proposition development.

8. Develop the target list – Determine the “customer” list to use to reach the target audience (i.e., in-house or purchase from brokers). Identify the customer segments on this list. Specify the list size, the quantity to test (as part of a test and control design), and the list cost. Select channels that best fit the target audience.

DM skills applied: test and control groups and schema design; DM vendor types.

9. Launch the DM campaign – All of the above steps are critical to the execution and success of the overall DM strategy and the specific DM campaign from multiple perspectives, e.g., cost

management, marketing opportunity management, customer relationship management, etc. Once the above steps have been completed, then execute the DM campaign.

DM skills applied: cost management, strategy to action/ implementation, campaign planning and management, customer experience management.

10. Measure the results – The success of the overall DM strategy and the specific DM campaign is determined by measurement. Too often, marketers spend tireless energy developing campaigns without a true benchmark for measuring its effectiveness. Worst yet, they spend millions of dollars with uncertain (and even, largely unmeasured) returns. Once the campaign is launched, conduct response analysis to measure how actual results compare to the expected outcomes initially defined and capture the key lessons learned. This type of measurement will ensure the efficiency and success of the overall DM strategy and subsequent campaigns.

DM skills applied: response analysis, marketing metrics and analysis.

Objective #3: Implement a Plan to Obtain Employment

Students will leverage what they learned in Objective #1 and develop a strategy and plan to a “real world”, personal, and near-term scenario of obtaining employment. Most of the steps from Objectives #1 and #2 apply as follows:

1. Develop the strategy and objective – Conduct a self-assessment of core skills, capabilities, and experience using SWOT. Leverage research from career placement offices, other students, alumni, outplacement services, etc. Identify the type of job opportunities being sought and the specific career objectives.
2. Define the target audience – Acquire a list of potential employers and group them into employer categories based upon job descriptions, roles, responsibilities, geographical locations, etc.
3. List the major steps in the plan – Develop a high-level plan to manage the job search process, including dependencies, what-if scenarios if and when delays or disappointments occur.
4. Set a completion date – Manage the job search process to a timeline, including milestones for major steps, e.g., finalize resume, complete job applications, schedule interviews, etc.
5. Determine the budget – Manage the job search process to a limited budget and impute funds accordingly (e.g., for interview attire, time spent away from current employer, travel, etc.).
6. Determine the expected outcome – Identify expectations or success rate for each job opportunity and employer category.
7. Develop the value proposition and the collateral – Determine how one’s skills, capabilities, and experience match the job opportunities being advertised and tailor communication and collateral accordingly (e.g., resume, curriculum vita, cover letter, follow-up letter, etc.).
8. Develop the target list – Identify the target list of potential employers (i.e., a test and control design, test and learn approach).
9. Launch the plan – Execute the plan for job opportunities via various channels (e.g., mail-in applications, website submissions, university services, job fairs, career development centers, etc.).
10. Measure the results – Track results from the various target goals (e.g. job opportunities and employer categories, graduate and professional schools). Improve and refine the plan accordingly, and re-launch as needed.

PRELIMINARY RESULTS

The direct marketing campaign projects have included a total of 165 students. This spans a time period of two and half years of using the simulation and personal goal campaign project. The preliminary results in terms of students attaining their career goals are the following:

- 26% have found internships
- 32% have found employment
- 11% have been accepted to graduate school

There were a number of students (21%) that had an existing full-time job. Almost all of the students (20%) who already had an existing job remained in the job during the period after taking the course.

Qualitative results from the project based upon Student Surveys from the course indicate that students have an overall appreciation of the skills learned. The course has consistently received the highest rated marketing courses in the department. Students have reported the following:

- An overall appreciation of the skills learned
- A realization that these skills should be taught to every student
- An understanding of the different job market channels and measuring the response rate for each channel

Overall the students were able to acquire and utilize the skills required in the direct marketing campaign project. However, students on average reported the hardest skills to learn were: Project Planning and Tracking In-Progress Campaign Results (conversion rate through the pipeline).

CONCLUSION

It is apparent that the steps for conducting a direct marketing campaign are easily transferable and can be applied to implementing a plan to obtain career goals (e.g., employment). The reason is direct marketing campaign teaches core marketing skills as well as provides a structured approach consisting of strategize, plan, execute, and measure. When taught using a simulation, students are more successful in acquiring and retaining these skills and applying them to “real-world” situations. Using approaches that link marketing concepts and skills to “real-world” and “life-long” learning skills help students retain marketing skills and achieve marketing learning outcomes.

FUTURE RESEARCH

The project will need a longitudinal study beyond three years to effectively measure the success of the project. The research will require several years to assess the retention of the marketing skills and specifically the adoption of a direct marketing campaign approach applied to job search by alumni of the course. It will also be interested to see differences of those alumni of the course who have careers where they are conducting direct marketing campaigns versus those alumni of the course who have careers not using direct marketing campaigns. Additionally, results in the utilization of the direct marketing campaign approach for job search can vary by alumni based upon majors and how many years after graduation in gauging the retention of marketing skills.

The effectiveness of this type of project is easily transferrable to other business majors based on the preliminary results of non-marketing business majors having completed the project. The skills utilized in the structured steps of a direct marketing campaign require knowledge of other business skills such as: writing, critical thinking, financial analysis, forecasting, economic analysis, database systems, and project management. These skills are taught and emphasized in the business disciplines of: accounting, computer information systems, economics, finance and management. The scope of the project could also be extended to non-business students such as liberal arts majors. Finding a job is not a major or a profession specific.

REFERENCES

- AACSB (2007). AACSB Assurance of Learning Standards: An Interpretation, Paper presented at the *AACSB International Accreditation Quality Committee*, Tampa, Florida, 1-16.
- Bonham, G. Matthew (2008). Using a Role-Playing Simulation to Bridge Theory and Practice in Graduate Professional Education, Paper presented at the annual meeting of the APSA Teaching and Learning Conference, San Jose Marriott, San Jose, California, Feb 22, 2008.

Carlson, J. L., Cohn, R. L., & Ramsey, D. B. (2002). Implementing Hansen's Proficiencies. *Journal of Economic Education*, 33, (Spring), 180-191.

Chakraborty, Goutam and Glen Nowak (1998), Teaching Direct Marketing and Teaching Exchange, in the *National Direct Marketing Institute for Professors*, Atlanta, Georgia, March 11-13.

DeNeve Kristina M. and Mary J. Heppner (2005). Role play simulations: The assessment of an active learning technique and comparisons with traditional lectures. *Innovative Higher Education* 21, (3), 231-246.

Doyle, J.M., & Wood, W.C (2005). Principal Course Assessment, Accreditation, and Depreciation of Economic Knowledge (2007). *Journal of Education for Business*, 80, (January/February), 176-185.

Kipps, P. H., & Kohen, A. K. (1984). The depreciation of human capital over time: The case of economic knowledge revisited. *Journal of Economic Education*, 15, (Winter), 90-91.

The Charles Schwab Corporation. (2011). *Hoover's Company Records*, 10320. Retrieved from <http://proquest.umi.com.mimas.calstatela.edu/pqdweb?index=0&did=168151531&SrchMode=2&sid=3&Fmt=3&VInst=PROD&VType=PQD&RQT=309&VName=PQD&TS=1328477650&clientId=17855>.