Business M731
Marketing Research
Winter 2013 Course Outline

Marketing
DeGroote School of Business
McMaster University

COURSE OBJECTIVE

Marketing research is an applied management discipline that is critical to understanding markets and customers in order to make better marketing decisions. The key objective of this course is to provide a learning environment for acquiring the essential working knowledge of when and how to conduct marketing research and the most effective way to communicate marketing information to support marketing decisions.

Prerequisites: M600 or equivalent and Q600 or equivalent.

INSTRUCTOR AND CONTACT INFORMATION

Dr. Ken Deal, MBA, PhD, CMRP, FMRIA
Associate Professor of Strategic Market
Leadership and Health Services
Management
deal@mcmaster.ca
Office: DSB #204 & RJC #217A
Office Hours: Monday 2:30PM-4:00PM,
6:15PM–6:50PM in RJC217A
& by appointment at DSB204
Tel: (905) 525-9140 x23971

Course Website: On course ftp site.

COURSE ELEMENTS

Credit Value:	3	Leadership:	Yes	IT skills:	Yes	Global view:	Yes
Avenue:	Yes	Ethics:	Yes	Numeracy:	Yes	Written skills:	Yes
Participation:	Yes	Innovation:	Yes	Group work:	Yes	Oral skills:	Yes

Course Description

This course guarantees you a hands-on opportunity to learn about a critical marketing management activity. You will have the chance to conceive of a research project for a real client, design the study, execute it, and report on the findings in a professional manner that will make you proud of your efforts. This will be a rare university learning experience that will stay with you long after you have graduated. Be enthusiastic about the challenge ahead. This course will be enjoyable and rewarding to you.

The course project will reinforce and integrate the concepts learned in the classroom and through your reading. This exposure should give you an appreciation of marketing as it is really practised. You will gain experience preparing written marketing research reports and working within a research team. In this environment, you will continue to develop your time management and organization skills while enhancing your communication skills.

Learning Outcomes

Upon completion of this course, you will have had the opportunity and training to:

- ✓ Understand the needs of marketing managers for marketing and market information;
- ✓ Determine the objectives of the marketing research project;
- ✓ Identify the type of research that will best help achieve the objectives;
- ✓ Learn how to write a good marketing research proposal;
- ✓ Discover how to develop great questionnaires;
- ✓ Understand how to manage and execute survey fieldwork;
- ✓ Determine how to best analyze survey data;
- ✓ Learn how to turn statistical findings into marketing information that gets attention;
- ✓ Learn how to write reports that convey marketing information simply and effectively and encourage marketing action; and
- ✓ Present marketing information to garner and maintain the attention of marketing decision makers.

Required Course Materials and Readings

Chakrapani, C. and K. Deal. *Modern Marketing Research: Step-by-Step.* Revised Edition, 2010. [Available free for reading from http://www.chuckchakrapani.com/StepByStep/Order.asp. The book can be purchased for printing at $4.95 per chapter or $39.95 for the complete book.]

Deal, Ken (2009). *A Guide to PASW (SPSS) Statistics 18.0*. [Available free for reading from http://www.chuckchakrapani.com/StepByStep/Order.asp. The book can be purchased for printing at $4.95 for the complete book.]

EVALUATION

Teaching Method

The main learning platform in this course will be your term project. Classes will consist of lectures, workshops, and discussion of your projects. Lectures will elaborate and reinforce the assigned textbook material. For this reason, the information will be covered quickly, allowing more time for examples and discussion. Therefore, it is important that you complete the assigned readings **before** class and bring any assigned lecture notes to class.

All work will be evaluated on an individual basis except in certain cases where group work is expected. In these cases group members will share the same grade adjusted by peer evaluation. Your final grade will be calculated as follows:

Components and Weights

Midterm Exam	Monday, March 4th in class 1.5 hrs	20%
Exercises	As assigned.	10%
Case analysis	Due March 4th in class	25%
Research project	(80% report; 20% presentation), Due April 8th in class	45%
Total		100%

Key Deadlines for Your Team Project:

Recruited Client..January 28th
Project Proposal..February 11th
Final Questionnaire..March 4th
Project Report & Presentation ....April 8th

The Case and Project Report are due by 7:00 P.M. in class, on the assigned dates. Failure to meet this deadline will result in a penalty of one letter grade, e.g., from A+ to A, for each day late. No excuses will be accepted.

NOTE: The use of a McMaster standard calculator (Casio FX-991) is allowed during examinations in this course. See McMaster calculator policy at the following URL:

http://www.mcmaster.ca/senate/academic/calculat.htm

Grade Conversion

At the end of the course your overall percentage grade will be converted to your letter grade in accordance with the following conversion scheme.

LETTER GRADE	PERCENT
A+	90 - 100
A	85 - 89
A-	80 - 84
B+	75 - 79
B	70 - 74
B-	60 – 69
F	*00 – 59*

Communication and Feedback

Students who are uncomfortable in directly approaching an instructor regarding a course concern may choose to send a confidential and anonymous email to the respective Area Chair at:

http://www.degroote.mcmaster.ca/curr/emailchairs.aspx

Students who wish to correspond with instructors or TAs directly via email must send messages that originate from their official McMaster University email account. This protects the confidentiality and sensitivity of information as well as confirms the identity of the student. Emails regarding course issues should NOT be sent to the Administrative Assistant.

Instructors are encouraged to conduct an informal course review with students by Week #4 to allow time for modifications in curriculum delivery. Instructors should provide evaluation feedback for at least 10% of the final grade to students prior to Week #8 in the term.

ACADEMIC DISHONESTY

It is the student's responsibility to understand what constitutes academic dishonesty. Please refer to the University Senate Academic Integrity Policy at the following URL:

http://www.mcmaster.ca/univsec/policy/AcademicIntegrity.pdf

This policy describes the responsibilities, procedures, and guidelines for students and faculty should a case of academic dishonesty arise. Academic dishonesty is defined as to knowingly act or fail to act in a way that results or could result in unearned academic credit or advantage. Please refer to the policy for a list of examples. The policy also provides faculty with

procedures to follow in cases of academic dishonesty as well as general guidelines for penalties. For further information related to the policy, please refer to the Office of Academic Integrity at:
http://www.mcmaster.ca/academicintegrity

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http://library.mcmaster.ca/about/copying.pdf

MISSED ACADEMIC WORK

Missed Mid-Term Examinations / Tests / Class Participation

Where students miss a regularly scheduled mid-term or class participation for legitimate reasons as determined by the MBA Academic Services Office, the weight for that test/participation will be distributed across other evaluative components of the course at the discretion of the instructor. Documentation explaining such an absence must be provided to the MBA Academic Services Office within five (5) working days upon returning to school.

To document absences for health related reasons, please provide the Petition for Relief for MBA Missed Term Work and the McMaster University Student Health Certificate which can be found on the DeGroote website at http://mbastudent.degroote.mcmaster.ca/forms-and-applications/. Please do not use the online McMaster Student Absence Form as this is for Undergraduate students only. University policy states that a student may submit a maximum of three (3) medical certificates per year after which the student must meet with the Director of the program.

To document absences for reasons other than health related, please provide the Petition for Relief for MBA Missed Term Work and documentation supporting the reason for the absence.

Students unable to write a mid-term at the posted exam time due to the following reasons: religious; work-related (for part-time students only); representing university at an academic or varsity athletic event; conflicts between two overlapping scheduled mid-term exams; or other extenuating circumstances, have the option of applying for special exam arrangements. Such requests must be made to the MBA Academic Services Office at least ten (10) working days before the scheduled exam along with acceptable documentation. Instructors cannot themselves allow students to unofficially write make-up exams/tests. Adjudication of the request must be handled by the MBA Academic Services Office.

If a mid-term exam is missed without a valid reason, students will receive a grade of zero (0) for that component.

Missed Final Examinations

A student who misses a final examination without good reason will receive a mark of 0 on the examination.

All applications for deferred and special examination arrangements must be made to the MBA Academic Services Office. Failure to meet the stated deadlines may result in the denial of these arrangements. Deferred examination privileges, if granted, must be satisfied during the examination period at the end of the following term. There will be one common sitting for all deferred exams.

Failure to write an approved deferred examination at the pre-scheduled time will result in a failure for that examination, except in the case of exceptional circumstances where documentation has been provided and approved. Upon approval, no credit will be given for the course, and the notation N.C. (no credit) will be placed on the student's transcript. Students receiving no credit for a required course must repeat the course. Optional or elective courses for which no credit is given may be repeated or replaced with another course of equal credit value.

Requests for a second deferral or rescheduling of a deferred examination will not be considered.

Any student who is unable to write a final examination because of illness is required to submit the Application for Deferred MBA Final Examination and a statement from a doctor certifying illness on the date of the examination. The Application for Deferred MBA Final Examination and the McMaster University Student Health Certificate can be found on the DeGroote website at http://mbastudent.degroote.mcmaster.ca/forms-and-applications/ Please do not use the online McMaster Student Absence Form as this is for Undergraduate students only. Students who write examinations while ill will not be given special consideration after the fact.

In such cases, the request for a deferred examination privilege must be made in writing to the MBA Academic Services Office within five business days of the missed examination.

Special examination arrangements may be made for students unable to write at the posted exam time due to compelling reasons (for example religious, or for part-time students only, work-related reasons):

- Students who have religious obligations which make it impossible to write examinations at the times posted are required to produce a letter from their religious leader stating that they are unable to be present owing to a religious obligation.
- Part-time students who have business commitments which make it impossible to write examinations at the times posted are required to produce a letter on company letterhead from the student's immediate supervisor stating that they are unable to be present owing to a specific job commitment.

In such cases, applications must be made in writing to the MBA Academic Services Office at least ten business days before the scheduled examination date and acceptable documentation must be supplied.

If a student is representing the University at an academic or athletic event and is available at an overlapping scheduled time of the test/examination, the student may write the test/examination at an approved location with an approved invigilator, as determined by the MBA Academic Services Office.

In such cases, the request for a deferred examination privilege must be made in writing to the MBA Academic Services Office within ten business days of the end of the examination period.

Note: A fee of $50 will be charged for a deferred exam written on campus and a fee of $100 for deferred exams written elsewhere. In cases where the student's standing is in doubt, the Graduate Admissions and Study Committee may require that the student with one or more deferred examination privileges refrain from re-registering until the examination(s) have been cleared.

STUDENT ACCESSIBILITY SERVICES

Student Accessibility Services (SAS) offers various support services for students with disabilities. Students are required to inform SAS of accommodation needs for course work at the outset of term. Students must forward a copy of such SAS accommodation to the instructor normally, within the first three (3) weeks of classes by setting up an appointment with the instructor. If a student with a disability chooses NOT to take advantage of an SAS accommodation and chooses to sit for a regular exam, a petition for relief may not be filed after the examination is complete. The SAS website is:

http://sas.mcmaster.ca

POTENTIAL MODIFICATIONS TO THE COURSE

The instructor and university reserve the right to modify elements of the course during the term. The university may change the dates and deadlines for any or all courses in extreme circumstances. If either type of modification becomes necessary, reasonable notice and communication with the students will be given with explanation and the opportunity to comment on changes. It is the responsibility of the student to check their McMaster email and course websites weekly during the term and to note any changes.

RESEARCH USING HUMAN SUBJECTS

Research involving human participants is premised on a fundamental moral commitment to advancing human welfare, knowledge and understanding. As a research intensive institution, McMaster University shares this commitment in its promotion of responsible research. The fundamental imperative of research involving human participation is respect for human dignity and well-being. To this end, the University endorses the ethical principles cited in the Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans:

http://www.pre.ethics.gc.ca

McMaster University has mandated its Research Ethics Boards to ensure that all research investigations involving human participants are in compliance with the Tri-Council Policy Statement. The University is committed, through its Research Ethics Boards, to assisting the research community in identifying and addressing ethical issues inherent in research, recognizing that all members of the University share a commitment to maintaining the highest possible standards in research involving humans.

If you are conducting original research, it is vital that you behave in an ethical manner. For example, everyone you speak to must be made aware of your reasons for eliciting their responses and consent to providing information. Furthermore, you must ensure everyone understands that participation is entirely voluntary. Please refer to the following website for more information about McMaster University's research ethics guidelines:

http://www.mcmaster.ca/ors/ethics

Organizations that you are working with are likely to prefer that some information be treated as confidential. Ensure that you clarify the status of all information that you receive from your client. You **MUST** respect this request and cannot present this information in class or communicate it in any form, nor can you discuss it outside your group. Furthermore, you must continue to respect this confidentiality even after the course is over.

ADDITIONAL HEADINGS

Specific Guidelines:

1. **The case analysis in M731 is an individual assignment**. As such, you must do the computer analysis work and the report writing by yourself, and without collaborating with your classmates. The case analysis you submit for grading must represent your original creation. If not, you will be charged with academic dishonesty.

2. Get in the habit of producing all your written work (case report, project questionnaire, research report) on a computer. In this way, required changes can be made swiftly and painlessly. Back up all your files with copies. You are responsible for safeguarding your reports against possible loss after being submitted for grading, by keeping a copy.

3. Both the case and the term project must be submitted as PowerPoint presentations. You will need to submit a paper copy, bound, and an electronic copy on a CD or DVD. Nothing handwritten will be accepted or reviewed by me. Drafts of interviewer-administered questionnaires may be on 8 1/2" X 14" paper.

4. This course emphasises effective communication, both written and oral. All assignments - written and oral - will be evaluated both in terms of their substantive content as well as their communication effectiveness.

COURSE SCHEDULE

M731
Marketing Research
Winter 2013 Course Schedule

The course outline that follows has been designed carefully to give you the needed lectures and practice when you need them in order to complete the case analysis and in order to reach specific milestones in your research project. By staying on top of classroom lectures and on top of your computing tutorials you will be in good shape throughout the semester. Once you fall behind in this course, it is extremely difficult to catch up. Don't even be tempted to fall behind. My time will not be used to brief you on material you missed because you skipped a lecture.

WEEK	TOPICS	ASSIGNMENT
1 07jan13	1. **WHAT IS MARKETING RESEARCH AND HOW DOES IT WORK?** **1.1 The Marketing Research Environment** • Introduction and welcome to marketing research. • Why does marketing research exist? • What is marketing? • What is market research and marketing research? • Who carries out marketing research? • What are the various types of marketing research? • What are the benefits of marketing research to marketing managers? • Professional commercial marketing research in Canada. • guide-lines for successful marketing research	Read: Ch1

1 & 2 07jan & 14jan	**1.2 How to Design a Marketing Research Project** • Why is research design important? • What was I thinking? • Why problems are not defined properly. • Confusing latent variables with manifest variables. • Confusing project objectives with the scope of the study. • A practical guide to defining marketing research problems. • Can this study provide answers to the problem? • What are marketing research projects like? • How is data collection designed? • When should qualitative research be used? • When should quantitative research be used? • Why is the marketing research proposal so important? • A very practical introduction to consulting in marketing research, obtaining a client, developing the project proposal, scheduling the project, and initiating the research process.	Read: Ch. 2 (also reference Ch 11 & Ch 12) 14jan13, Guest Speaker, Mike Nestler, Director of Quantitative Methods, isync, Toronto
2 & 3 14jan & 21jan	**2. STATISTICAL ANALYSIS OF SURVEY DATA** **2.1 Introduction to Statistical Analysis Using SPSS** The analysis of survey data using a computer-based statistical package -- SPSS Windows. This session will be held during class on 09jan10 & 16jan10. **Make sure that you bring *A Guide to SPSS 18.0* and a USB drive to that session.** -	Workshop: SPSS, bring SPSS book and a computer to class Begin case analysis.

4 28jan11	**2.2 Data Reduction, Processing and Tabulation** • Editing; coding; tabulation (one-way & cross-tabs) **2.3 Data Analysis: Basic Questions** • Choice of analysis technique; type of data; research design; • assumptions for statistics, hypothesis testing, confidence intervals; • univariate and bivariate analyses • cross tabs & Chi-Square test • z-test for the difference between proportions • t-test for the difference between two means	Ch. 9
5 04feb11	**2.4 Data Analysis: Multivariate Analysis** • Analysis of variance and • Linear regression. • Other multivariate methods **2.5 Data Analysis: Other Non-Parametric Procedures** • Correlation and difference tests for nominal and ordinal data. • Friedman analysis of variance	Ch 13 & 14 **Guest Speaker:** Chris Bondarenko from Vision Critical
6 & 7 11feb & 25feb	**3. HOW TO DESIGN A QUESTIONNAIRE** • The development of questionnaires will be covered in depth. A specific questionnaire design will be explained. The principles taught in this section must be used for the project questionnaires. BREAK WEEK, 18FEB13	Ch. 6 25feb13, Guest Speaker, Derek Pollitt, Teradata, former president of his MBA class at DSB.

8 04mar	**4. HOW TO MEASURE ATTITUDES, BEHAVIOUR AND TRAITS** • How to write screeners and warm-up questions • General overview of measurement and scaling • How to measure attitudes • How to assess behaviour • Lifestyle measurement • Measuring demographic traits	Ch. 7 **CASE ANALYSIS ---- Due 04mar, *7:00 P.M.*** **Questionnaire**
8 11mar	**5. HOW TO MANAGE THE MECHANICS OF RESEARCH** • How is fieldwork done? • How to secure confidentiality and assure quality • What factors influence fieldwork? • Interviewer training • Data collection online • Processing the data	Ch. 8 **Mid-term Exam ---- In class.**
9 18mar	**6. HOW TO CARRY OUT QUALITATIVE RESEARCH: FOCUS GROUPS AND IN-DEPTH PERSONAL INTERVIEWS** • the purpose, design and execution of focus groups • designing the discussion guide, recruiting respondents, moderating the group discussion, debriefing clients and presenting the findings	Ch. 5
10 25mar	**7. HOW TO FIND AND USE SECONDARY AND STANDARDIZED INFORMATION** • advantages and disadvantages of secondary data; • internal and external sources of data; • some marketing information services.	Ch. 3

11 25mar	**8. HOW TO DRAW SAMPLES** **8.1 Sample Size** • Population and sample characteristics; intention of the sampling (variables, attribute, precision, and confidence) **8.2 Sampling Procedures** • Sampling plan; non-probability and probability samples; estimation; stratified and cluster sampling • **8.3 Adjusting for sample bias** • Techniques to adjust results to account for sample biases and non-representativeness, sample weighting	Ch. 4
12 01apr	**9. ETHICS IN MARKETING RESEARCH** • Rights & obligations among parties • Common-sense relationship building in marketing research • Responsibilities to the public	Throughout course + Ch. 12
12 01apr	**10. HOW TO PRESENT RESEARCH FINDINGS** • A short course in business communication • Avoid gobbledygook • Use Multiple Exposure • Write with a purpose • Providing key marketing research deliverables • How to effectively present research findings • Writing the formal research report	Ch. 10
13 08apr10	**11. Presentation of YOUR Applied Marketing Research Projects**	Projects due @ 7:00 P.M.

CASE ANALYSIS

There are two purposes of the case analysis: 1) to get you to understand the statistical software that you will be using to analyze your own survey data; and 2) to practice writing a numerically-based report for a client in an understandable way.

After completion of the SPSS tutorials, you will be given access to a case and a large database. Problems will be assigned to you and your task will be to analyze the data in a creative fashion and to present your results in a short PowerPoint report. Bring imagination and creativity to your data analysis, interpretation and presentation of findings. If you do this, it will be reflected in your grade.

This is an individual effort and you must do all of the case analysis by yourself. The report due date is given in the course outline. There is a **penalty of one letter grade, per day**, for late submission (e.g., from A- to B+, if only one day late).

Start working on the Case Analysis no later than Week 4, by which time the lectures will have covered many of the data analysis tools available to you for doing a good job on this assignment.

Budget your time wisely. The work **cannot** be done properly on the last weekend before it is due. Writing the report will take several days on its own!! Do not assume that the printer you might use will be able to handle your graphics. Try a test page with them prior to submitting your report.

RESEARCH PROJECT SCHEDULE

Above all else, keep in mind that everything you do in this research project for a client reflects on McMaster University, the School of Business, your professor and your research team. Over the years, we have developed a good reputation with the business community and the public. Let's foster it through conscientious work, competence, integrity and total honesty.

A. PROJECT TEAMS

1. Form a team of 5 members, **immediately,** and select a company name.
2. Select one member as **project leader**.
3. Questions about your project will be discussed **only if the project leader is present**. No exceptions.

B. PROJECT LEADER

1. Delegate the work on this semester-long project. Take on one-fifth of the workload. Assign one-fifth of the total effort to each of your colleagues.
2. Take a calendar and agree, in writing, with each member when, exactly, his/her component of the project will be due. Make each colleague specify, up front, any foreseen absences during the semester (a family wedding, a booked weekend, exam studies) so that you can plan around these. The last thing you want is a group member who does not deliver by a due date, leaving other members stranded without the component needed for the next phase of the project.
3. Be firm with any slackers. Don't tolerate sloppy work and bad behaviour. It can damage the overall quality of your project. If a slacker doesn't get the message, assemble the group and confront the slacker, directly.
4. Your best friend in this course is a single-sheet calendar on which you have marked out key dates, key tasks, key people on each job, and phase-completion deadlines.

C. CLIENT

1. By **28jan12**, your group must have obtained a client in need of survey research. **Avoid potential clients who say, “I think I can find something for you to work on.”** Find a client who has a burning question and knows what type of market information will be needed to solve a clearly articulated problem.
2. Ensure that your prospective client is fully aware that you will be billing the client for your group's out-of-pocket costs for conducting the study (generally between $200 and $500). You may wish to bill the client for one-half of your expected costs at the beginning with the remainder billed after you have submitted your final report.

D. RESEARCH PROPOSAL

1. No later than **11feb12**, the final draft of your group's research proposal must have been formally approved by me. It must be a typed draft--not handwritten. Following my approval, or any requested changes, you may proceed to retype the final draft and make **three copies**. <u>**Your client is not to see the final proposal until it has been approved and signed by me and the team.**</u>

2. On the last page of **each** copy must be the **Agreement of Intent** form (see attachment at end), signed by every member in your **group**. Bring all three copies of your proposal to class and **I** will also sign these forms. <u>**Lastly**</u>, get your **client** to sign all three copies. After all parties have signed, distribute copies, as follows:

    1. Client
    2. Professor
    3. Retained by Project Leader.

3. The **Agreement of Intent** form asks you to insert the client's name and the consultant’s name. As consultants, give your team a name (e.g., Classic Marketing Research).

4. Your team's research proposal must look **professional**. Remember that you are dealing with a business client. All of your contacts with your client must be conducted in a professional manner. Dress up whenever you visit your client. Don't show up unprepared and disorganized. Have a list of clear objectives that you want to accomplish during every meeting with your client. Even telephone calls to your client should be carefully thought out so that using your client's time achieves a very specific goal. This client-contact experience is excellent training for your future career in the business world. Therefore, every group member should share the experience: visit your client as a complete group--never individually. In addition, ten ears are better than two ears when investigating your client's problem and research needs.

5. When writing up your proposal, include the headings in the **Format for Research Proposals** guideline attached to this course guide.

E. SURVEY QUESTIONNAIRE

Thursday, **04mar12** is a crucial date for you. This is the last day by which I will approve questionnaires, so that your fieldwork can begin. Your questionnaire must be printed the way it will look to the respondent if self-administered or to the interviewer if interviewer-administered. The process for the questionnaire is as follows:

1. ask your client to meet with you and to discuss the questions that need to be asked of respondents;

2. the study team should develop a good draft questionnaire and meet with the client to discuss and modify the questionnaire as needed;
3. the questionnaire should be submitted to me by **04mar12** at the latest. I'll review the questionnaire and provide feedback for any necessary modifications.

F. IN-CLASS PRESENTATIONS (08apr12)

1. The final day of classes is devoted to formal in-class presentations of your research projects. You are encouraged to **invite your client to attend**.

2. Attendance at these presentations, including all students not making a presentation, is mandatory. I will check attendance according to the class list. A student who skips class loses 2% of the final course mark for <u>each</u> presentation day missed. Only a documented medical reason will absolve you. Job interviews will not count as a valid excuse. Don't ask me for permission to miss a presentation, without penalty. Out of respect for those who are presenting, I will not grant it.

3. The order of group presentations will be alphabetical by client company name.

4. Each member of the study team must be involved in the final presentation. Be prepared to explain the complexities of your project interestingly and vividly to a class that has never before seen your work and has no idea of what your group did. Impress the class and you will impress me enough to be generous in my grading.

5. Your presentation must be professional. Dress for the occasion. Use PowerPoint and other appropriate audio-visual displays. Time the talk precisely. You are allowed exactly 20 minutes. I will cut you off if you go beyond that limit.

6. A week in advance of your presentation date, get your team members to prepare well-designed presentation material. Use a **few**, well-chosen exhibits to reveal to the class your most interesting and **valuable** findings.

7. As part of my evaluation of your group's research project, I will grade your in-class presentation.

8. Base your in-class presentation on the following outline:

<u>BACKGROUND</u>

* Who is the client? How was this client found?
* What is the product/industry/service/concept?
* What is the client's problem; <u>why</u> was the research needed?

<u>RESEARCH IMPLEMENTATION</u>

* What is the population of interest?
* What did you use as a sample frame?
* How did you sample? What was the sample size? What was the response rate?
* What were some of your team's first-hand experiences in the field (funny occurrences, frustrations, unexpected problems, embarrassing moments)?

FINDINGS

* What are the answers to your key **critical** questions? Don't go through each of the research hypotheses.
* Most interesting and valuable findings?
* Any surprising findings?

IMPLICATIONS

* What, exactly, should your client do now?
* Explain the importance of your findings for your client's marketing?
* What did you learn from this research experience?

G. THE BIG DAY

1. **Monday, April 8th** is the day when several things must be delivered, by 7:00 P.M. in class:
   a. Your group-project report;
   b. Your optional, confidential **Peer Evaluation Sheets**.
   c. The questionnaires from your project

2. You will need to prepare an invoice for your expenses and present it to your client. See the attached SAMPLE INVOICE.

3. Submit a completed **Peer Evaluation Sheet**, deliver it separately and in person to the Marketing Area Secretary in a sealed envelope, marked "CONFIDENTIAL: For Prof. Deal."

4. Group-project reports that are received late will be graded with the following penalty scale: one grade level (e.g., from A- to B+) for each day beyond the deadline.

5. See the attached **Outline of Research Report** for the required format of your group-project report.

6. Provide me with the survey questionnaires or electronic responses, whichever is appropriate.

FORMAT FOR RESEARCH PROPOSAL

The research proposal lays out your plan of research for this project. It answers the questions: (1) What is the problem being investigated? (2) How will this problem be studied? (3) What can the client expect to get at project completion?

It should include the following (use the same headings and sequence listed):

COVERING LETTER

A letter to your client's contact person, giving the reason for submitting the proposal and reasons why the prospect should give the project to your consulting team. At the end of the letter, include <u>each</u> team member's home and alternate telephone numbers; **I do not want clients calling me to relay messages to the project team.**

TITLE PAGE

Include the title of the project, client's official name, contact person's name, date, full names and telephone numbers of all project team members.

1.0 THE PROBLEM

Describe your client's company/organization very briefly. Describe the problem, the suspected cause of the problem, and the company's present situation. Carefully explain <u>why</u> the research is needed!

2.0 OBJECTIVES OF THE PROJECT

State your research questions or research hypotheses. These should be listed and worded as exactly as possible. Under each research question or hypothesis, list the key variables or measures on which data must be collected.

3.0 RESEARCH METHOD

Provide the following in as much detail as possible. Be prepared to defend your methodology.

* What type of research design?
  Exploratory/Descriptive/Causal? (Yours will likely be descriptive or exploratory.)

* What types of secondary data will you dig up, in order to clarify the research questions and/or determine your research design?

* What primary data collection procedures will you probably use?
  - Define the population from which you will be sampling.

- Specify your sampling plan. Probability/Non-probability?
- Specify method of data collection. Telephone/Personal interview/Mail questionnaire?
- Specify the types of data analysis which will be needed.
- The data will be analysed using the Statistical Package for Social Science (SPSS). Frequencies, cross-tabulations and other appropriate statistical analysis will be conducted.

* Limitations of the project.

4.0 **ORGANIZATIONAL PROFILE OF YOUR TEAM**

Provide an organizational chart of the project team. Indicate the project leader and the functions of each team member. A <u>short</u> profile highlighting each team member's special skills and strengths is useful.

5.0 **PROJECT SCHEDULE**

Provide a time schedule for the project. A Gantt chart or other visual diagram of your timeline is very useful. MS Project is handy for planning and presenting your timeline.

Schedule the following key tasks or stages in your project:

* Secondary data collection.
* Design, pre-test, and revision of questionnaire.
* Drawing of sample frame and identification of respondents.
* Execution of survey.
* Retrieval, coding, and editing of data.
* Analysis of the survey data.
* Interpretation of data for in-class presentation.
* Written report and oral presentation of findings.

6.0 **PROJECT BUDGET**

Itemize a budget for your anticipated out-of-pocket expenses (typing services, printing, telephone, stationery, postage, binding, paper, etc.) The standard mileage charge for research use of your private automobile is 55¢ per kilometre. Total costs can range between $200 and $500. **Typing and duplication services MUST NOT BE DONE BY YOUR CLIENT, even if the client offers to do this**. Experience has shown that this does not work out and can severely disadvantage your project. Keep control of everything that you can.

AGREEMENT OF INTENT

The **Agreement of Intent** form should be retyped for your specific client. Give your project team a name (e.g., KPCG Group) and insert it where it says "project team."

OUTLINE OF RESEARCH REPORT

Most marketing research reports are constructed in PowerPoint these days. While this format saves a lot of writing, it puts a great deal of emphasis on ensuring that each slide is informative and that important material is not left out of the report because it does not conform to typical exhibits. You will need to be very creative to effectively communicate all important information in your report. **MAKE SURE TO FOLLOW A GOOD FORMAT FOR POWERPOINT REPORTS.**

The main body of the report must be readable and understandable by any person with a reasonable education. The intention of the appendix is to prove to me that you understood how to analyze the data and that your conclusions are well-founded.

Guidelines: The research report should include the following (use headings and sequence listed):

Cover

Directly on the cover of your report, give the project title, date the report was prepared, name of client's organization, by whom prepared, supervising professor.

Executive Summary

On a single slide, briefly summarize the major findings of your study, in point form.

Table of Contents

A listing of contents of the report and page numbers.

1.0 **Introduction**

The introduction provides background information which the reader needs, in order to appreciate the discussion in the body of the report. Mention should be made of your sponsor and the management problem that they are confronted with. It should give the background of the problem (for example, how and when it came into existence), the importance of the problem, the various dimensions of the problem, and whether any previous research was done which is pertinent to the specific project being reported. Unfamiliar terms or terms that are used in a specific way in the report should be defined here. Any history that would be pertinent to the problem should be mentioned (for example, history of business, industry, etc.)

2.0 **Statement of Research Objectives**

Begin the research report with a statement of your objectives and/or research hypotheses. These should be stated as clearly as possible. If possible, list them one by one. Indicate which are primary objectives and which are secondary.

3.0 **Research Methodology**

Discuss your sampling and field procedures and any other pertinent methodological information. Include discussion of your secondary data search here. Following are some of the questions which should be answered here:

What type of research design was used?

Why was this type of design used?

What data collection methods were used? (primary, secondary; survey, observation).

What data collection devices were used? (telephone, personal interviewing)

Why were these devices appropriate for this project?

How was the population defined? What were its geographic, demographic, or other bounds?

What sampling units were employed? Were they business organizations or business executives? Were they dwelling units, households, or individuals within a household? Were they students or non students?

Was a probability or non probability sampling plan employed? Why? How was the sample actually selected? How large a sample was selected? Why was this size sample chosen?

How was a list of sampling units generated? Why was this method used?

Were any difficulties experienced in contacting designated sample elements? How were these difficulties overcome and was bias introduced in the process? How was the fieldwork done?

Was any pretesting of the questionnaire done?

4.0 **Findings**

Remember, a client has paid money to have you ask certain questions. As a starting point, the client wants to know how the questions were answered. The fancier hypothesis testing is the cream but do not forget the milk!! **Charts, tables and graphs** can say more than paragraphs and prose. Make sure your findings are **understandable to a general audience**.

Absolutely no statistical or marketing research jargon should appear in the body of your report. There must be no statistics in the report body, only in the

appendices. You will lose many marks if statistics and technical jargon are included in the report body.

Introduce and report the results of your analysis of the data (including findings from secondary data sources). Categorize your findings under the subheadings of your research objectives and/or hypotheses. Provide an interpretation for the results of whatever analysis you do. Omit any information that is interesting but irrelevant in terms of the specific research objectives and/or hypotheses. Tables and figures should be used **liberally** when presenting the results. While the exhibits in the appendix are complex, detailed, and apply to a number of problems, the exhibits in this findings section should be simple summaries of this information, directed to the specific research objective and/or hypotheses being discussed.

You should have a "Key Findings" and "Supporting Findings" sections.

5.0 Summary and Conclusions

Make some final conclusions about the results of your analysis. Relate your conclusions/findings to the objectives/research questions you listed at the beginning of the report. A step-by-step development of the conclusions should be given. There should be a conclusion for each study objective or problem. The conclusions should be stated in greater detail than in the executive summary. Readers should be able to read the objectives, turn to the conclusion section, and find specific conclusions relative to each objective. If the study does not provide evidence sufficient to draw a conclusion about a problem, this should be explicitly stated.

Note: Marketing recommendations are not included in this section. This is only a summary of the analyses of your major research questions.

6.0 Marketing Recommendations

This section includes recommendations as to what action, if any, the firm should take. It can also be used to suggest future areas of research. It should be clearly demonstrated how each recommendation follows from the information presented earlier in the report. (For the learning process, you should make recommendations in both your Case Analysis and Term Project. Keep in mind that you are a consultant and do not know your clients' businesses as well as they do.)

7.0 Methodological Limitations

Discuss the limitations of the data in terms of your objectives (for example, indicate any crucial variables you found were missing from the data). Also possibly suggest some modifications for the study and questionnaire which you would recommend for a future study. Sources of non-sampling error and the suspected direction of their biases might be discussed. Readers should also be informed specifically as to how far the results can be generalized. Research design limitations could be discussed. For example, if the study is exploratory and designed to find new hypotheses, readers should be warned not to conclude that the results are an accurate measure of the phenomenon studied. If particular questions in a survey seem to have confused respondents, the readers should be warned to use particular care in interpreting the results of these questions. If many not-at-homes or refusals were encountered in the fieldwork and substitutions were made, readers should be cautioned as to the effect this could have on the results. In general, include anything which might qualify your findings, conclusions, and/or recommendations. In describing any limitations of the study, how much the limitations might affect the results and in what direction should also be indicated.

8.0 **Appendix**

The purpose of the appendix is to provide a place for those report items which would clutter up the Findings section, because they are either too detailed or too specialized. For example, the appendix may contain a detailed statement of the sample design, the formulas used to determine the sampling error, detailed statistical tables, and the various research forms used, such as the questionnaire. This appendix might be submitted in Word format if you feel that is more convenient. Nothing should be relegated to the appendix if its absence from the Findings section will make it difficult for the reader to understand the results. If certain data are discussed in any detail, the tables containing such data should be INCLUDED IN THE FINDINGS, AT THAT POINT. In many cases, the main ideas can be presented graphically in the Findings section. In that case, the tables on which the charts are based should be included in the appendix. Following is a further list of things which can be included in the appendix (although it is not limited to these).

Include general information from secondary data: tables, references or annotated bibliography, advertisements, etc.

Maps used to draw the sample as well as a detailed explanation of the sample design used. Sample size determination.

Detailed calculations for hypothesis testing or confidence-level determinations.

Coding manual used in coding the data.

Summary of responses to all questionnaire measures, written directly onto the answer spaces of a blank questionnaire.

Completely blank questionnaire used in the study.

To make it easier for the reader to refer to these appendices, index tabs must be used. Never bury important findings in the appendices -- put them in the body of your report.

DO NOT GET CARRIED AWAY HERE. REMEMBER THAT LONG REPORTS AND LONG APPENDICES ARE NOT READ BY CLIENTS! PUT IN ONLY THOSE ITEMS WHICH ARE PERTINENT!

Format for Findings Section - Extremely Important

Findings: Answers to Questionnaire Questions

Answers to each question must be provided, whether the findings were "significant" in a statistical sense or not. Some of these findings should be presented in graphs, some in charts, some in tables and some using two formats simultaneously. Basic findings can be stated very simply, for example, "46% of the respondents were male and 54% were female." Those findings that are important directly to the project objectives and will motivate key decisions should be placed in the "Key Findings" section. The remaining answers to questions, hypotheses and objectives should be located in the "Supporting Findings" section.

Findings: Marketing Hypotheses

Address each hypothesis in turn, providing a full business interpretation.
Appropriate use should be made of graphs, tables and charts.

Format for Appendices

Appendices: **Table of Contents for Appendices**

Appendix 1: **Glossary of Terms** (including a basic explanation of the statistical tests used)

Appendix 2: **Questionnaire**

Appendix 3: **Coding Manual**

Appendix 4: **Frequency Distributions** (The frequency distributions for each question in the order in which the questions appeared in the questionnaire.)

NB: It is necessary to provide all the statistical information as explained below in "Appendix 5" for those relationships that are found to be **"statistically significant."** It is necessary to provide the detailed statistical output from SPSS as described below in "Appendix 5" for only **two** hypotheses that are found to be **"not statistically significant,"** i.e., just two sets of results, not for every one. For the "not significant findings," list the findings in a table similar to that presented below.

Hypothesis	Variables	Test	significance (p)	Conclusion
H1:-----	1 Intention to buy (Q.27) 2. Income (Q.32)	Chi-Square ANOVA	0.09 0.12	Not Significant Not Significant
H2:-----	1. Awareness (Q.12) 2. Income (Q32)	Chi-square	0.38	Not Significant

Appendix 5: **Hypothesis 1** (State the hypothesis as H_O and H_a and then provide all of the findings, analysis and interpretation that is relevant for the testing of that hypothesis. Statistical information, notation and terminology may be used here. Also include "business interpretations" of the analysis. Explain or state any manipulations of the data that you performed to prepare the data for each analysis. In the case report, Xeroxed computer output can be used, but notations and explanations should be added. For the term field project, the SPSS output should be sent to a file, taken into your word processor and then altered to make it easily read and interpreted. An alternative to the file transfer would be to retype the appropriate tables, charts and graphs. Graphs and charts can be used in the appendices in addition to the tables.)

Appendix 6: **Hypothesis 2** (Same as above.)

Appendix 7-?: **Hypothesis 3,4** (Same as above.)

Appendix xx: **Verbatim Comments** (If important verbatim comments can be extracted from the questionnaire, summarize them in this appendix.)

Use labelled tabs on the first (title) page of each section and each appendix

Report Requirements:

1. Communication is very important in research. Accordingly, the evaluation of your report will be based, in part, on the accuracy and clarity with which your findings are presented. Remember that this report must be understandable to your client (The appendix should include the more technical details).

2. Use subheadings and headings where appropriate to improve the communication of your findings. Bold or underline to emphasize. Headings should be presented consistently throughout your report (either centred or left-justified).

3. Sections should be titled and a numbering system used (2.0, 2.1, 2.1.1, etc.).

4. Use tables, graphs, and charts if they will summarize and clarify results.

5. Present general findings from secondary information in main body of report. Detailed secondary information should be located in the appendix.

6. In the summary section of the report, use tables of data or statistics very carefully and, perhaps, exclude completely. New information should not be presented here. Summarize key information in point form.

7. The presentation of hypothesis tests or statistical analysis **MUST** be left in the appendix to the report.

8. Labelling the appendix for each type of information makes it easier to reference (for example, Appendix A, Appendix B, ..., Appendix H). **YOU MUST USE INDEX TABS FOR APPENDICES.**

9. Make the report look professional: use only one type of paper, use only one printer, use a good binder, and be neat. Design and render all graphs and charts carefully and neatly.

10. Correct all typographical errors. Use correct grammar. A good report is discredited because of these errors even though the report is methodologically sound.

11. Refer to appendix numbers and table numbers within appendices from the main body of your report.

12. Keep the body of the report to a maximum of 40 pages, excluding appendices. But remember -- "Short is beautiful". There have been 20 page reports that have received grades of A+.

13. **Each member of your group, your client and your professor must have a copy of the final report. The final report will be in PowerPoint. It will include your in-class presentation and will typically be longer and, of course, include the appendices.**

14. Final reports are not returned to students. They can be read after the final exams.

BUSINESS M731 – WINTER 2013

MARKETING RESEARCH TERM PROJECT
GROUP EVALUATIONS

INSTRUCTIONS:

1. You are to assign to each person in your group an amount of money which represents each individual's contribution to the project.
2. Your total budget to distribute among the people in your group is $1,000 * (the number of people in your group). For example, if there are 5 people in your group, then pretend that you have $1,000 * 5 = $5,000 to pay out to the group.
3. If everyone contributed equally to the project, then pay each person $1,000.
4. Adjust the fee to each person according to your honest personal assessment of the value of each person's contribution. In our example, the fee could be as low as $0 or as high as $5,000.
5. Your evaluation is to be done by you with no consultation with others in your group or from other groups.
6. In most cases, these evaluations will be valuable input to your professor in allocating marks. However, your professor might decide not to use the evaluations for some groups under unusual circumstances.
7. TREAT THIS EVALUATION SERIOUSLY.
8. MAKE SURE THAT THE FEES PAID ADD TO $1,000 * GROUP SIZE.

YOUR NAME: ____

YOUR SIGNATURE: ____

GROUP NAME: ____

CLIENT ORGANIZATION:____

GROUP MEMBER (alphabetical order)	FEE
_______________________________________	__________________
_______________________________________	__________________
_______________________________________	__________________
_______________________________________	__________________
_______________________________________	__________________

SAMPLE INVOICE

To: Jack Jones
Love Boat Cruises
123 Main Street
Everywhere, Ontario
L8R 2G1

Date: April 8, 2013

Research expenses incurred by students completing a marketing research project in Business M731 (supervised by Prof. Deal) for the client.

Personal automobile mileage, 310 km @55¢	$ 170.50
Photocopying (questionnaires, report)	127.00
Long-distance telephone calls to client	8.35
Stationery for fieldwork (envelopes, clipboards, markers)	43.12
Typist's fee for preparation of report and graphs	120.00
Binding of reports	20.00
Total	$488.97

Please send reimbursement cheque to:

Ms. Janet Smith
69 Anylane St.
Ancaster, ON L4G 2B2
Tel. (416) 583-1186 (Signature)
Janet A. Smith, Project Leader

McMaster University
DeGroote School of Business

*** AGREEMENT OF INTENT ***

Marketing Research Student Project

This agreement is made in triplicate this _________ day of _________, 201__, between (CLIENT'S NAME) and the (PROJECT TEAM), hereinafter called the "CLIENT" and the "CONSULTANT".

The undersigned parties are in agreement with the intent and nature of the research as described in the proposal. The "CLIENT" agrees to assume responsibility for the "CONSULTANT'S" out-of-pocket costs. No consulting fees other than the "CONSULTANT'S" costs will be charged. The "CONSULTANTS" will endeavour to provide a meaningful analysis of the subject matter by the date stated in the proposal, and otherwise adhere to the schedule of activities.

The "CLIENT" recognizes that the "CONSULTANT" is a group of students from McMaster University's DeGroote School of Business and that this project is a requirement of their marketing research course. Their course mark will depend heavily on the success of this project. The "CONSULTANT" is in most cases executing a marketing research project for the first time and claims to have no professional expertise in this area.

Signatures: Client: _________________________________

Consultant:_________________________________ (Project Leader)

____

____

____

____

____

Supervising
Professor: _________________________________

Business M731 - Marketing Research, 2013

Project Team #

Client Company: ____

Company Contact Person:_____________________________________

Project Title:____

Project Leader:____

Team Members: email addresses, phone numbers

1.____

2.____

3.____

4.____

5.____

6.____

Career Profile
Dr. Ken Deal, M.B.A., Ph.D., CMRP, FMRIA
Strategic Market Leadership and Health Services Management,
DeGroote School of Business,
McMaster University

Areas of Expertise

Ken’s expertise lies in the area of using sophisticated marketing and marketing research to provide significant insights that help organizations build and enhance marketing strategies. He has developed marketing models to assess the potential of new products, evaluate the effectiveness of advertising and to enhance marketing decisions in a variety of management areas. Ken has substantial experience in the health sector, pharmaceutical research, energy sector, telecommunications, tourism, aviation industry, financial services, automotive parts and service, government services, environmental issues, packaged goods, retail grocery and others.

Dr. Deal has provided expert testimony to the Federal Court of Canada, the Superior Court of Ontario, the Supreme Court of Ontario, U.S. courts and professional tribunals and has advised several government departments on strategy and their markets.

He has presented executive seminars in strategic marketing for private, public and non-profit sectors, in marketing research, pricing and in other topics. Ken is an active teacher, researcher and practitioner in marketing research, marketing modeling, marketing management and strategy.

Professional Activities

Dr. Deal’s most recent book *Modern Marketing Resarch: Step by Step* was co-authored with Chuck Chakrapani and was revised in 2010 as an e-book. *Marketing Research: Methods and Canadian Practice*, again co-authored with Chakrapani, was published in April 1992 by Prentice-Hall. Ken also wrote A Guide to PASW (SPSS) Statistics 18 and is available as an internet book. These books add to Dr. Deal’s other publications that have appeared in a variety of professional and academic journals.

Dr. Deal was Chairman of Strategic Market Leadership and Health Services Management at McMaster University from 1998 to 2007, a position he held from 1982 to 1986. He served as President of the Canadian Survey Research Council in 2000/2001, President of the Professional Marketing Research Society (now, Marketing Research and Intelligence Association, MRIA) in 1998/1999. Ken was elected Lifetime Fellow of the Professional Marketing Research Society (FMRIA) in 2000 for “his outstanding contributions to marketing research in Canada”. He has been a professor of marketing in McMaster University’s DeGroote School of Business since 1973. Dr. Deal is president of marketPOWER research inc. and is a Certified Marketing Research Professional (CMRP).

Student Profile **M731 Winter 2013** **Team ___**

Name _____________________ ________________________

Student # _______________________

Email Address _______________________________________

Phone number ____________________ _____________________

MBA Stream/Concentration ________________________________

☐ **Co-op programme?** ☐ **Full time programme?** ☐ **Part time programme?**

 # MBA Courses Taken? ________

Most valuable MBA course to date? ______________________

Did you take M600?

☐ **YES**

☐ **NO**

Did you take M732?

☐ **YES**

☐ **NO**

Did you take Q600?

☐ **YES**

☐ **NO**

Undergraduate Degree ____

Undergraduate University ____

Graduate Degrees ___________ from ______________________________________

Most recent employer ____

Position ____

Prior employer ____

Position ____

Marketing research experience

____

____