

# GUIDED TEACHING OF COMPLEX MARKETING PROCESSES VIA IMPLEMENTATION OF LEARNING CONTROL POINTS

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## ABSTRACT

*Where course objectives suggest a series of progressive steps, periodic learning check points ensure students' readiness to progress. Learning control points (LCPs) provide a structure for phased learning that enhance decision-making skills and increase the likelihood of successful progress and retention of concepts and knowledge. This building-block approach is borrowed from the product development management concept of "stage gates." Instructors set intermediate learning objectives (LCPs) that must be met prior to progression. In this research, assessment of the efficacy of LCPs shows students have higher overall satisfaction with the course and stronger retention of course concepts.*

## INTRODUCTION TO THE PROBLEM

Woolridge (2006) reminds us that, although it is gratifying to see students enjoy learning, it is the instructor's responsibility to assure that learning has serious purpose and relates to course objectives (Smith and Van Doren 2004). At the same time, industrial constituents of universities are demanding marketing graduates that are better able to manage themselves and others, handle projects involving a series of crucial sometimes interdependent tasks in a timely fashion, and generally perform their duties in a professional and skillful manner as they work through complex and dynamic business situations and problems (Kelly and Bridges 2005; Shribrowsky, Peltier, and Boyt 2002). Some authors have suggested, in response to these demands, curricular and pedagogical changes that engender more practical and integrative, yet reflective, learning so that participants can develop business skills while discovering new insights during their educational programs (Braun 2004).

Thus, marketing courses should incorporate realism and complexity, as much as possible, while developing professional and project management skills necessary in marketing practice (McCole 2004). The purpose of this manuscript is to describe the incorporation and efficacy of a pedagogical innovation, learning control points (LCPs), which addresses the realism and complexity students might encounter post graduation while developing the professional and project management skills necessary to succeed in the marketplace.

LCPs are akin to the stage gate process often used in the marketing research process and project management,

particularly the new product development process (cf., Cooper 1993). A series of control points are established whereby students cannot proceed beyond each critical stage without the approval of the instructor. For example, when analyzing cases, developing marketing plans, conducting marketing research projects, or other complex comprehensive processes taught within the marketing curriculum, the instructor specifies key check points for progression. Continuation to the next step is permitted only when the participants demonstrate the knowledge and judgment that should have been integrated to that point. Each LCP is established around an important course or teaching objective and reflects the interdependency of decision-making at various stages of complex processes. Because unacceptable performance indicates poor learning and/or lack of effort for some students, remedial work and/or revisions should be attempted to improve understanding and correct the deficiency before proceeding with additional case analysis, marketing plan development, research, project work, or other course objectives. Since learning can best be internalized through guidance from feedback (Young 2002), incorporating LCPs can help ensure desirable outcomes at each course objective, critical point, or stage while encapsulating the overall learning process in a project management structure that students can employ within their marketing career positions post graduation. The purpose of LCPs is to ensure learning progression, enhance students' decision-making and communication skills, and to increase the quality and probability of success. The stage gate's most important benefit may be in helping students understand how different components of a complex process fit together while

emphasizing the interrelated nature of decision-making at various stages. Thus, LCPS can be utilized in and adapted to a wide variety of marketing courses.

### **LCPS AND COURSE/CURRICULUM STRUCTURE**

It is widely accepted that students learn more when they take an active role in the learning process as knowledge is created through a transformation of experience (Howard and Henney 1998; Kolb 1984). Experiential learning encourages participants to be involved with the content of real life situations involving ambiguity, change, and risk (Lewis and Williams 1994). Active learning helps to internalize theory through guided practice (Young 2002). Experiential activities improve communications skills and integrate concepts and theories (Frontczak and Kelley 2000). A wide variety of marketing courses can be structured around experiential and active learning activities (e.g., marketing research, product development, personal selling and sales management, and marketing strategy).

Concept-based courses are generally presented with low experiential structured methods while strategy courses are often presented with high experiential unstructured methods. Cases may be presented with either of the two kinds of methods. Low experiential structured methods focus on presenting concepts or terminology in a carefully planned or prearranged fashion with students as relatively passive receptors. High experiential unstructured methods focus on teaching processes with students as active participants, often in dynamic environments with real-time data (Klebba 1999). Less structure places the burden on the student to recognize important issues, to generalize and apply issues to new situations, and to integrate learning into the overall structure of marketing practice (Hershey and Walker 2006).

Along these lines, the application of LCPS in a capstone marketing strategy course, employing live case analyses as the primary pedagogical method, will be described in this article for brevity's sake, although similar stage gates are applicable to other marketing courses and projects. Lincoln (2006) and Forman (2006) provide excellent parallel discussions of the benefits and variety of case teaching methods. Cases teach higher order critical thinking skills and permit the participant to suggest actions instead of simply knowing the facts. Although a wide range of learning goals and activities are applicable, students believe that real-world scenarios are more challenging and enjoyable.

However, case problems in textbooks may be obsolete by the time of publication (Forman 2006). Additional drawbacks of cases in textbooks include a disconnection from the reality and complexity of organizational and decision culture (Andrews and Noel 1986), the reinforcement of outdated gender roles (Byrne 1993), students play

the relatively passive role of analyst (Bailey et al. 2005), and limited information that is provided by the case author (Forman 2006). The emotional safety provided by an obsolete case published in a textbook often allows students to remain uninvolved and unconcerned with poor decisions.

On the other hand, live cases include a variety of methods and some include current operational information available in "real time" (Kennedy, Lawton, and Walker 2001). Such live cases deal with ambiguity and conflicting information (Lincoln 2006), provide the benefit of keeping students current with business environments, instill a sense of immediacy to the situation, and leverage students' experience to benefit all participants in the activity (LeClair and Stöttinger 1999). Furthermore, Karns (2005) found that applied real-world activities such as live cases were perceived as a more effective learning tool than other learning activities.

Live case participants are free to make good and bad decisions in the process as with many experiential formats. Conventional case pedagogy permits errors to be acknowledged only after the end of the project, semester, or session. Imagination and creativity may go unrestrained until the end (cf., Forman 2006). The instructor's options are to (1) permit some students to fail by following a poor early decision through to the end while hoping learning can be reformed via post-hoc criticism and reflection or (2) require specific learning at specified points with constructive criticism and reflection that can increase the quality of the final product and the probability of developing well-founded marketing strategy. In this manner, inappropriately creative solutions and imagination are somewhat restrained through the instructor review/approval process inherent with use of LCPS.

Therefore, instructor interaction via incorporation of LCPS can halt poor logic or incorrect assumptions at key check points in the case analysis process, enhance learning, and ensure accomplishment of teaching objectives. Periodic criticism and progress approval also help to prevent procrastination, keep students on task, and improve their overall time management and decision-making skills. Communication skills can also be enhanced when students' progress is provided via formal presentations to and discussions with the instructor, and/or industry representative(s) when such participate, at the various stages.

### **APPLICATION OF LCPS IN A CAPSTONE MARKETING STRATEGY COURSE**

While our application of LCPS focuses on live case analyses conducted in a capstone undergraduate marketing strategy course, similar stage gates may be used for other projects and classes. Periodic assessment is particularly appropriate when final outcomes are dependent upon the success, quality, and accuracy of analyses and

work accomplished in earlier stages. It is important to note that the number of LCPs may vary depending upon course requirements, specific learning objectives, the nature of an individual project, and the overall time frame for completion of an assignment.

The overall goals of a capstone undergraduate marketing strategy course are, typically, to enhance students' decision-making skills and to teach the marketing strategy development and implementation process while getting students to understand the relationship among the stages. The measurable objectives are to ensure that students can (1) conduct industry research and gather competitive and environmental intelligence, (2) assess a firm's strengths, weaknesses, opportunities, and threats (i.e., SWOT analysis), (3) select an appropriate target market, (4) develop an appropriate value proposition for the selected market, and (5) develop appropriate pricing, promotion, and distribution strategies given data and information regarding a new or established product or service. Students should learn that the viability of their strategy recommendations depends upon the quality and accuracy of research, analyses, and decisions with respect to each of the five objectives listed above. Almost real-time changes in the current situation and information can be included when using live cases to enhance the realism of the experience.

LCPs were implemented within the capstone undergraduate marketing course at a large top-25 public university in the Southeast United States. It was included in the course syllabus and the instructor briefly described the live case assignment at the beginning of each semester. Specific cases were introduced at mid-semester, student teams were formed, and dates for various LCPs were provided. The LCPs utilized are described in Exhibit 1.

Practicing professionals representing the central firms in the live cases participated at some stages as guest speakers. The speakers helped to emphasize the applicability, practicality, and importance of the LCP procedures in several ways. First, these representatives visited classes, at the introduction of the case, to discuss the importance of each LCP. The speakers emphasized the importance of a clear and concise value proposition, at that time, because the statement addresses benefits provided to customers and forms the foundation for strategies that would later be recommended. After defining target markets, students had to write and get approval of a two-to-three sentence value proposition that explained benefits to customers at the first LCP.

The target market selection and value proposition were based upon information in a case study booklet that included guidelines for case preparation and presentation

**EXHIBIT 1  
LIVE CASE LEARNING CONTROL POINT (LCP) PROCEDURE**

<b>LCP Number</b>	<b>Description of Learning Control Points</b>
1	Select the target market(s) and write the value proposition. Due date is approximately two weeks after the case kickoff.
2	Contingencies or changes to the initial situation faced by the central firm introduced on an almost real-time basis. (The number of changes varied each semester.)
3	Instructor feedback regarding whether initial marketing strategies are consistent with the approved value proposition/target market.
4	Draft strategic plan submitted for review. (The instructor informs the team about inconsistencies, missing information, and areas for improvement but does not comment on specific recommendations.)
5	Student team submits questions they anticipate will be asked by the case's central firm representative.
6	Oral presentation and debriefing with the instructor and the case's central firm representative occur during the final exam time frame.
7	Students list the pros and cons of the live case procedure. (Their comments provide assessment of the efficacy of the procedures outlined above.)

and other details provided by guest speakers from the case's central firm. Preliminary value propositions were submitted via e-mail but must have gained approval from the instructor and/or guest speaker before further strategies could be developed. Often, teams had to submit at least two or more drafts of the value proposition before it was approved.

Second, reflecting the dynamic nature of real-time business markets, contingencies and/or changes were introduced at various points while students were developing marketing strategies. The teams were required to demonstrate an understanding of the initial situation and new contingencies to get approval for continuing with the project. Note that changes occurred more than once during some semesters increasing the number of LCPs. Each student team appointed one person to regularly contact the instructor and/or company representative with questions regarding initial and new information. Failure to stay abreast of changes resulted in denial of approval to continue.

Finally, each team presented their marketing strategies and responded to questions from the instructor and

the representative. A debriefing after the presentation provided students an assessment of the plan, recommendations for improvement, and professional presentation tips that might help students in their careers. Company representatives typically offered prizes in the form of gift certificates to teams that gave the best presentations and produced the best plans. Students also asked questions regarding ways to handle different business situations and why the company would or would not take certain actions. The students then provided the instructor and industry representative with their opinions regarding what was learned, the helpfulness of the LCPs, and how the process could be improved.

#### ASSESSMENTS OF LCP EFFICACY

Over a four-year period, approximately 400 students were enrolled in class sections utilizing LCPs. Qualitative assessments of efficacy were accomplished several ways. First, current students were asked several open-ended questions. These students were asked to list the pros and cons of the procedure, what exactly was learned during

### EXHIBIT 2 EXAMPLES OF CURRENT STUDENTS' COMMENTS REGARDING POSITIVE ASPECTS OF LCPS

Student	Comment
1	The feedback was exceptional. I really appreciated the time and attention we were given. The product was difficult at first, but taught us how to leverage our resources and dig deeper to understand something we knew little about. It also created more of a team atmosphere because we had to search together.
2	The feedback helped us throughout the project. Though the case was structured, it allowed for a lot of creativity. My greatest joy was seeing us all work together and make some amazing promotional items.
3	The feedback was absolutely the best part of the experience; I gained valuable skills that will help me in my future presentations and project proposals. In the beginning of the project I was overwhelmed, and I wished that I would have taken advantage of the opportunities to get more feedback as well as I wish that our team would have taken advantage of our CREATIVE out-of-the-box ideas!
4	Really enjoyed the feedback during the case and after the presentation because it helped us to connect our ideas and think about concepts and ideas that we didn't fully develop.
5	POSITIVES: Great learning experience. Good feedback during case and after presentation (this really is beneficial). This allows you to actually implement marketing principles you have learned in a "real-life" setting. It's nice to get "insider" information from corporate managers.
6	Strengths: Process and feedback were helpful. After presentations were very helpful in breaking down our strategies and how they would work in the real world. Definitely brought in our marketing backgrounds, process was a long and vigorous, but a good experience.

the process when LCPs were used, and what they would change to make improvements. Second, unsolicited comments were obtained, typically via email, from alumni. Approximately 80 alumni provided such comments over the four-year period. Finally, representatives from the firms featured in the live cases offered their unstructured commentary.

Overall, current students thought that LCPs were beneficial in keeping students on track with regard to time management while ensuring their analyses were not disjointed. Most indicated they had learned a great deal with regard to marketing strategy development. More specifically, comments such as those quoted in Exhibit 2 were typical regarding the positive aspects of LCPs.

However, current students' comments regarding LCPs were not entirely positive. A few students said they were accustomed to procrastination and did not like having to meet extra deadlines. Many commented they needed more information about the real-world situation and thought more product information should have been provided by the participating company representatives although

developing concise value propositions during the onset of the project was helpful. Some students thought there was a need for even more feedback and LCPs and that case materials should have been distributed earlier in the semester.

In contrast, unsolicited comments from alumni were positive across the board. These comments suggest the LCP process enhanced knowledge retention while improving professional skills. Examples of unsolicited quoted comments from alumni are shown in Exhibit 3.

The company representatives that participated in the live case analyses and helped with the LCPs had similarly positive comments. They agreed that the process is beneficial and didn't mind spending time with students to improve the learning process. Each semester, 6–8 of these professionals met with students and corresponded via e-mail. Some of their comments are quoted in Exhibit 4.

Several other observations regarding the use of LCPs deserve note. First, students learned to write more concisely and give presentations without using notes. Many said these were key learning outcomes of the entire

<b>EXHIBIT 3 EXAMPLES OF UNSOLICITED COMMENTS REGARDING LCPS FROM ALUMNI</b>	
<b>Alumnus</b>	<b>Comment</b>
1	Dr. _____, I was just wanting to let you know that I was able to use some of the information we learned in our ____ final project. Feedback on the value proposition, the situation (especially related to “green” environment) and strategies helped. Just thought it was neat to see college classes play a role in my current life.
2	Learning how to do the value proposition was so important. At work, the first thing I was asked was “What’s your value proposition?” We talk about value propositions daily. Students should take advantage of the opportunity to get feedback. It helps to learn how to get and stay on track.
3	I feel so much better prepared than others at work. We actually use all the stuff we had to do in MKT _____. Thanks for making us have approval so that we could learn how everything fits together.
<b>EXHIBIT 4 EXAMPLES OF COMMENTS REGARDING LCPS FROM PARTICIPATING CORPORATE REPRESENTATIVES</b>	
<b>Representative</b>	<b>Comment</b>
1	The students get it. The process seems to work.
2	If we can help the students understand how everything has to fit together and improve how they make and present recommendations, I’ll be glad to meet with them any time.
3	Some of the students have put everything together as well as employees.

process. Second, students worked harder to be better prepared during final presentations when they felt intimidated or unprepared during the early stage LCP discussions. Learning to conduct more professional presentations was a key outcome for many students as noted in their comments.

### DISCUSSION OF LCP LIMITATIONS AND CHALLENGES

Given the comments above, we suggest that LCPs can be applied to many learning situations that build from fundamental concepts through intermediate steps to a more complex learning objective. The illustration of moving from value proposition to marketing strategy development may be translated to marketing research projects, product development processes, promotional development, or any course at the undergraduate and graduate level that focuses on teaching interdependent processes. LCPs might be less suitable for some survey type courses that have less obvious stepwise approaches or course objectives. For example, it may be more difficult to use LCPs in consumer behavior or marketing principles classes depending on how the courses are approached by the instructor.

Along these lines, empirical evidence of the efficacy of LCPs in other courses should be gathered before making definitive conclusions. Several suggestions regarding courses where LCPs might best be utilized were addressed earlier in this article. We suggest that future research incorporate the use of quantitative and qualitative measures of efficacy at the various LCPs that are established. Program assessment is a mandate for AACSB accredited institutions and include measuring the degree to which students achieve predefined desired learning outcomes. These assessments can be particularly critical for state-funded institutions that desire increased budgets or fewer reductions in monetary support during difficult economic times. The evidence gathered for this study

overwhelmingly suggests LCPs have substantially increased the probability of achieving course objectives. The process, *a priori* establishment of desired learning objectives and periodic measurement of progress toward these outcomes, generally meets AACSB assessment criteria.

However, implementing and using LCPs is a time consuming process for the instructor and others that participate. Several issues must be taken into consideration. First, it takes solid commitment and sustained effort from all involved to achieve course objectives. The amount of work for instructors and others, obviously, increases with the number of LCPs. Second, class size is an issue that must be taken into consideration. The number of students per section was constrained to no more than 25 in our application of LCPs. Third, scheduling guest speakers and assigning industry partners, if used, can be challenging. We are fortunate to have industry partners who really want to work with students, but it may be difficult to get outside participation unless there are well-established corporate relationships. Fourth, students, in general, think it is a great deal of work and some prefer to procrastinate while others may naturally grasp concepts and ideas less rapidly. We have found, however, that peer influences tend to keep the classes moving at a satisfactory pace. None of the teams wanted to appear to be that slowing down the entire class. In addition, bragging rights and the relatively inexpensive prizes (e.g., gifts certificates to book stores and coffee shops) offered for the best presentations and plans by our corporate partners have proven to be desirable incentives for student teams. Finally, some students say they have multiple projects across their courses and that they are “busy.” This problem, however, seems to occur regardless of the assignment. Other students suggested starting work on the case earlier in the semester. Different starting dates have been used, but there is not consistency of opinions from students on “the best date.”

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