

GENERAL FACULTY MEETING AGENDA | THURSDAY, APRIL 16, 2020 | 3:00PM | Zoom Meeting

1. The Minutes for the March 17, 2020 General Faculty Meeting is presented for approval by the faculty. No live meeting took place, but items were still presented to the faculty online.
2. The Undergraduate Committee voted to approve the following item and requests approval by the faculty. **(see attachment)**

FIN 4453 Financial Modeling

Current Credit Hours:	2
Proposed Credit Hours:	4
Current Prerequisites:	FIN 3403 with minimum grade of B or an equivalent course as approved by the Dept of Finance.
Proposed Prerequisites:	FIN 3403 with a minimum grade of B and (ACG 2021 and ACG 2071 with minimum grades of C
Current Course Description:	The course demonstrates how intricate financial spreadsheet models can be applied to aid in value creating activities for businesses such as valuation, additional funds needed analysis and additional applications that may include activities such as leasing and merger analysis.
Proposed Course Description:	The course demonstrates how intricate financial spreadsheet models, along with other modeling tools, can be developed and applied in value creating activities for businesses such as securities modeling, financial statement cash flow modeling, and derivatives modeling.

3. Other Business
4. Dean's Report

GRADUATE FACULTY MEETING AGENDA | THURSDAY, APRIL 16, 2020 | 3:00PM | Zoom Meeting

1. The Minutes for the March 17, 2020 Graduate Faculty Meeting is presented for approval by the faculty. No live meeting took place, but items were still presented to the faculty online.
2. Both the MBA Committee and the Specialized Graduate Committee voted to approve the following items and requests approval by the faculty. **(see attachment for additional information)**

MAR6158 International Marketing

Credit Hours:	3
Prerequisites:	MAR 5805. Designed for M.B.A. students.
Rationale:	This an existing course number that is being reactivated. It is a key elective in our Online MBA program.

MAR6XXX Marketing Analytics 1

Credit Hours:	2
Prerequisites:	-A key prerequisite for this course is a basic understanding of the statistical programming language R. -A second key prerequisite is an adequate background in math and statistics appropriate for the topic. -The third prerequisite is an adequate laptop capable of operating both Microsoft Excel and the statistical programming scripting language R. (see attachment for all information about prerequisites).
Rationale:	This course is an upper level analytics course to be offered to Master of Science in Business Analytics, MBA, and other specialized Masters' Programs in the Hough Graduate School of Business.

MAR6XXX Marketing Analytics 2

Credit Hours:	2
Prerequisites:	It is NOT required that students take Marketing Analytics 1 prior to taking Marketing Analytics 2. The two courses cover different Marketing Analytics models and techniques. However, the requirements for success are similar to Marketing Analytics 1: -A key prerequisite for this course is a basic understanding of the statistical programming language R. -A second key prerequisite is an adequate background in math and statistics appropriate for the topic. -The third prerequisite is an adequate laptop capable of operating both Microsoft Excel and the statistical programming scripting language R. (see attachment for all information about prerequisites).
Rationale:	Graduate level course supporting Master of Science in Business Analytics, MBA, and specialized Master in Business programs.

MAR6XXX Marketing Analytics Methods

Credit Hours: 2

Prerequisites: Microsoft Excel familiarization

Rationale: Elective course in Marketing Analytics for Master in Marketing and specialized Master in Business programs.

MAR6XXX Marketing Ethics

Credit Hours: 2

Prerequisites: MAR 5806 or equivalent

Rationale: This course deals with ethical practices in marketing, an increasingly important topic in the digital and global arenas. It will serve as a key elective for students in our MBA, MIB, MSM, and MS in Marketing programs.

QMB6XXX Analytics Processes for Business - Bootcamp

Credit Hours: 1

Prerequisites: None

Rationale: This course is an introductory course for the Business Analytics track. It is the first in a series of analytics courses intended to prepare students to work on practicum projects with companies.

QMB6XXX Analytics Practicum 1

Credit Hours: 1

Prerequisites: Analytics Processes for Business-Bootcamp

Rationale: This course is for the Business Analytics track. It is the second in a series of analytics courses intended to prepare students to work on practicum projects with companies.

QMB6XXX Analytics Practicum 2

Credit Hours: 1

Prerequisites: Analytics Practicum 1

Rationale: This course is for the Business Analytics track. It is the third in a series of analytics courses intended to prepare students to work on practicum projects with companies.

QMB6XXX Analytics Practicum 3

Credit Hours: 1

Prerequisites: Analytics Practicum 2

Rationale: This course is for the Business Analytics track. It is the fourth in a series of analytics courses intended to prepare students to work on practicum projects with companies.

3. Other Business

4. Dean's Report

GENERAL FACULTY MEETING MINUTES | TUESDAY, MARCH 17, 2020|

NO MEETING TOOK PLACE DUE TO COVID-19 BUT FACULTY VOTED FOR ITEMS ONLINE

1. The Minutes for the October 7, 2019 General Faculty Meeting was presented online for approval by the faculty. A motion was made and seconded, and the faculty voted to approve the minutes as presented.
2. The Undergraduate Committee voted to approve the following items. The items were presented online for approval by the faculty. A motion was made and seconded, and the faculty voted to approve the following items.
 - WCB BABA Business Administration (BABA-GBAONL) - WCB BABA Business Administration General Studies 6-8 Universal Tracking Plan. Tracking requirements expanded to terms 6-8 per Provost guidance.
Proposed Curriculum Changes Universal tracking updated to require 2.0 UF, CORE, and MAJOR GPA's during terms 6, 7, and 8.
 - WCB BABA Business Administration (BABA-GBA)- WCB BABA Business Administration General Studies 6-8 Universal Tracking Plan. Tracking Requirements expanded to terms 6-8 per Provost guidance.
Proposed Curriculum Changes Universal tracking updated to require 2.0 UF, CORE, and MAJOR GPA's during terms 6, 7, and 8.
 - WCB BSBA Business Administration (BSBA) - General Business 6-8 Universal Tracking Plan Tracking requirements expanded to terms 6-8 per Provost guidance.
Proposed Curriculum Changes Universal tracking updated to require 2.0 UF, CORE, and MAJOR GPA's during terms 6, 7, and 8.
 - WCB BSBA Finance 6-8 Universal Tracking Plan Tracking requirements expanded to terms 6-8 per Provost guidance.
Proposed Curriculum Changes Universal tracking updated to require 2.0 UF, CORE, and MAJOR GPA's during terms 6, 7, and 8.
 - WCB BSBA Information Systems 6-8 Universal Tracking Plan Tracking requirements expanded to terms 6-8 per Provost guidance
Proposed Curriculum Changes Universal tracking updated to require 2.0 UF, CORE, and MAJOR GPA's during terms 6, 7, and 8.
 - WCB BSBA Management 6-8 Universal Tracking Plan Tracking requirements expanded to terms 6-8 per Provost guidance.
Proposed Curriculum Changes Universal tracking updated to require 2.0 UF, CORE, and MAJOR GPA's during terms 6, 7, and 8.
 - WCB BSBA Marketing 6-8 Universal Tracking Plan Tracking requirements expanded to terms 6-8 per Provost guidance.
Proposed Curriculum Changes Universal tracking updated to require 2.0 UF, CORE, and MAJOR GPA's during terms 6, 7, and 8.
3. Other Business - none
4. Dean's Report - none

GRADUATE FACULTY MEETING AGENDA | TUESDAY, MARCH 17, 2020|

NO MEETING TOOK PLACE DUE TO COVID-19 BUT FACULTY VOTED FOR ITEMS ONLINE

1. The Minutes for the October 7, 2019 General Faculty Meeting was presented online for approval by the faculty. A motion was made and seconded, and the faculty voted to approve the minutes as presented.
2. Other Business - none
3. Dean's Report - none

Course|Modify for request 14831

Info

Request: FIN 4453 Financial Modeling

Description of request: The current 2-credit FIN 4453 course would be replaced with this updated 4-credit course. This course would be offered as an elective as it has been for the last 3 years.

Currently, for this 4 credit course, we are using a special topics course and number to address this non-permanent course issue. Eventually, this foundational tools course is quite important pedagogically and professionally and will likely be required in place of the Debt and Money Markets course, where the important content in that course would be covered in the Equity course as well as this Financial Modeling course.

Submitter: Deborah Himes debbie.himes@warrington.ufl.edu

Created: 3/26/2020 11:18:44 AM

Form version: 1

Responses

Current Prefix FIN

Course Level 4

Number 453

Lab Code None

Course Title Financial Modeling

Effective Term Spring

Effective Year 2021

Requested Action Other (selecting this option opens additional form fields below)

Change Course Prefix? No

Change Course Level? No

Change Course Number? No

Change Lab Code? No

Change Course Title? No

Change Transcript Title? No

Change Credit Hours? Yes

Current Credit Hours 2

Proposed Credit Hours 4

Change Variable Credit? No

Change S/U Only? No

Change Contact Type? No

Change Rotating Topic Designation? No

Change Repeatable Credit? No

Change Course Description? Yes

Current Course Description The course demonstrates how intricate financial spreadsheet models can be applied to aid in value creating activities for businesses such as valuation, additional funds needed analysis and additional applications that may include activities such as leasing and merger analysis.

Proposed Course Description (500 characters max) The course demonstrates how intricate financial spreadsheet models, along with other modeling tools, can be developed and applied in value creating activities for businesses such as securities modeling, financial statement cash flow modeling, and derivatives modeling.

Change Prerequisites? Yes

Current Prerequisites FIN 3403 with a minimum grade of B or an equivalent course as approved by the Department of Finance

Proposed Prerequisites FIN 3403 with a minimum grade of B and (ACG 2021 and ACG 2071 with minimum grades of C

Change Co-requisites? No

Rationale The catalog listed course was a short, 8 week module abbreviated course, but we no longer offer these short module courses in Finance. Instead, we have been offering a fully developed semester course the last few years as a 4 credit hour course with special topics number of FIN 4934. The fully developed semester course is important as it meets the content and tools needed for Finance majors. We want to give it a permanent, official number, corresponding to our currently listed 2-credit course and eliminate the 2-credit our course.

FIN 4934
Financial Modeling

Course Syllabus
Spring 2019 Term

COURSE INSTRUCTOR

Professor John C. Banko, Ph.D., CFA
Senior Lecturer of Finance

Office: David Stuzin Hall, Room 321A

Office Hours: Tuesday & Thursday, 10a – 12p

Phone: (352) 392-6395

E-Mail: john.banko@warrington.ufl.edu

COURSE LOCATION

FIN 4934 is being taught as an Electronic Platform (recorded) class. The class is taught in Heavener Hall, Room 150, every Monday and Wednesday, during Periods 3-4 (officially, 9:35-10:25 AM & 10:40-11:30 AM, but we will take only a short break between the two periods). Students are encouraged to attend the live sessions and actively participate. Seating is limited to 55 students and is on a first come, first served basis.

COURSE OVERVIEW AND OBJECTIVES

Purpose: The goal for this course is to develop the skills needed to use and create intricate spreadsheet models, geared toward the business community. The course will be project based, with a focus on mortgage-backed securities, securities modeling, financial statement cash flow modeling, and derivative modeling.

COURSE PREREQUISITE

FIN 4243 and FIN 4504, or equivalent courses, as approved by the College's Undergraduate Programs Office, Room 267 David Stuzin Hall, Phone: 273-0165.

COURSE MATERIALS TO PURCHASE FROM BOOKSTORE / ONLINE

The materials for the course will be:

1. Laptop/Excel. You must have and bring a Windows-based laptop to class that has Excel. Apple will not work, since you cannot run macros in Mac OS.
2. You will need simulation software. You have two several:
 - a. Simtools by Roger Myerson. This is an older simulation package developed by Nobel Laureate Roger Myerson. This can be accessed at this [link](#).
 - b. Crystal Ball. You can download a 30-day trial from Oracle. This can be accessed at this [link](#).
3. WallStreetPrep access. This will be discussed during the first few days of class. The cost for this will be about \$100.
4. Coursepack from Harvard Business School Press. Instructions will be available on the course site in E-Learning. The cost for this will be under \$10.
5. Lecture Notes, available in the E-Learning course website.
6. A variety of chapters and full textbooks will be utilized throughout the term. All of them will be freely available through the UF libraries.

COURSE GRADES

Course grades will be calculated using points from each project. Our goal this term is to complete 5 projects, plus 3 exercises from WallStreetPrep. Each of the projects will have a few components, with different requirements, deadlines, and point assignments. Also, each of the 5 projects will have a peer review component.

Course grades will be based on the following numeric scale:

Minimum Points	Course Grade
90%	A
87%	A-
84%	B+

80%	B
77%	B-
74%	C+
70%	C
67%	C-
64%	D+
60%	D
57%	D-

The grade cutoffs may be adjusted down, particularly if assignments are more difficult than expected. Grade cutoffs will never be increased. Student grade information will be maintained in the Gradebook function in E-Learning.

COURSE TEAM PROJECTS

Course projects will be completed in teams, usually of 3 or 4 members. You will be assigned to one team for the first three projects, up to spring break. And then you may be assigned to a different team for the second half of the course. Projects deliverables will be uploaded/posted to E-Learning (which will list the exact date and time due). Part of the grading process is a peer review of the project.

These projects are expected to be professional work. Presentation is important. At a minimum:

- Where required, all text should be typed and presented in a case-like format.
- Spreadsheets and graphs should fit on one page or separated in a logical manner. They should be visually appealing, easy to read and incorporated into the text.
- You should include a cover page/tab with each person's name and project title.
- You should have subsections labeled with brief descriptions immediately preceding the spreadsheet and qualitative analysis.
- All spreadsheets should be labeled with a title and description.

In general, I should be able to read through the project and follow the analysis easily without referencing the assignment.

The project details may change during the term. But, the plan right now is for the following projects:

1. Valuation model for an MBS (210 points total)

You will be given the layout for a MBS issued by Freddie Mac. Your job is to develop a valuation of the tranches. The primary deliverable is the Excel spreadsheet. A 1-page (or so) write-up will be required to explain tranches that are complicated and deserve some discussion.

2. Performance reporting and risk evaluation (160 points total)

For this project, your team will be given a Harvard case about a small asset management firm. Your job is to develop a 1-page (single-sided or double-sided, up to you) handout that the firm would use to summarize its investment philosophy and performance for the two funds it operates. These are known as “tear sheets”. You can (kind of) see examples of such 1-page documents by running a search for a “sample tear sheet” on any of the internet search engines.

This is likely the first time many of you have tackled such an assignment. Your primary job is to get the numbers right – calculate the various portfolio fund performance measures as outlined in the case (correctly) and think about how to present them in a meaningful way. This will be an intermediate deliverable for this project.

More importantly, I want to see the performance report directly tied to the spreadsheet. If I update numbers on the spreadsheet, the performance report is updated as well. From there, develop bells and whistles to make the spreadsheet and report more usable and user-friendly.

The deliverable is the spreadsheet and the report that the spreadsheet creates.

3. Additional Funds Needed model (160 points total)

You will be given the financials and other relevant data for a corporation and/or a scenario. The project involves developing a model to determine the funding needs of the company. Valuation impact based on using debt versus equity will be examined. The deliverable is a 2-3 page executive summary of the results and scenarios. Results from your Excel spreadsheet should be incorporated as Exhibits, Tables, and/or Charts. The full spreadsheet will also be uploaded.

4. DCF / Pitch Update (160 points total)

Your team will be responsible for researching a firm and developing a DCF valuation of the firm. Then, your team will update a Powerpoint “pitch” presentation. The deliverable will be the DCF valuation and the PPT presentation.

Several firms will be selected in advance, and several teams will be assigned to each firm. Grading will be head-to-head against the other teams working on the same firm.

5. Creative case development/presentation and model (160 points total)

For the final project, your team will develop a spreadsheet model of your choice. Your team will develop the project scope and deliverables, and your team will present your project to the class via a 10-minute presentation in class. The deliverables will be the presentation (50 points) and spreadsheet (100 points, including the peer evaluation).

Note the dates of the presentations. Although this is an EP course, at least one team member must be present on the date of your team's presentation to make the presentation. All team members do not need to be present.

Also, you will complete three of the training exercises in WallStreetPrep, for 150 points.

For all cases, peer evaluations (for part of each project) are required. A 50-point penalty will be assigned if this is not completed and submitted. Peer evals are a critical component of this class.

LYNDA.COM

Part of the goal of this course is to increase your Excel skills. In fact, to do well, you need to have some skills developed. If you find the first few lectures difficult to follow due to the Excel, UF has licensed Excel training videos from Lynda.com. This includes 8+ hour "introductory" videos on Excel.

Access is available on the UF website: <http://elearning.ufl.edu/>

STUDENTS WITH DISABILITIES

Students requesting accommodations for their disability must first register with the Dean of Students Office. The Dean of Students Office will provide documentation/forms to the student, who must then provide the documentation/forms to Dr. Banko. Please note that the Dean of Students Office requires a 7-10 day lead time to process your request after they receive the form back from you.

More information is available on the DRC website: <http://www.dso.ufl.edu/drc/>

TENTATIVE SCHEDULE

Week One		
Date	Day	Assignment / Activity
1/7/2019	Monday	Introduction, syllabus, course example
1/8/2019	Tuesday	
1/9/2019	Wednesday	Project 1: MBS
1/10/2019	Thursday	
1/11/2019	Friday	
1/12/2019	Saturday	
1/13/2019	Sunday	

Week Two		
1/14/2019	Monday	Project 1: MBS
1/15/2019	Tuesday	
1/16/2019	Wednesday	Project 1: MBS
1/17/2019	Thursday	
1/18/2019	Friday	Project 1-1 due: Practice Peer Review
1/19/2019	Saturday	
1/20/2019	Sunday	

Week Three		
1/21/2019	Monday	University: Martin Luther King Day - No Classes
1/22/2019	Tuesday	
1/23/2019	Wednesday	Project 1: MBS
1/24/2019	Thursday	
1/25/2019	Friday	Project 1-2 due: MBS Correction
1/26/2019	Saturday	
1/27/2019	Sunday	

Week Four		
1/28/2019	Monday	No class - start WallStreetPrep
1/29/2019	Tuesday	
1/30/2019	Wednesday	No class - start WallStreetPrep
1/31/2019	Thursday	
2/1/2019	Friday	
2/2/2019	Saturday	
2/3/2019	Sunday	

Week Five		
2/4/2019	Monday	Project 1: MBS
2/5/2019	Tuesday	
2/6/2019	Wednesday	Project 1: MBS
2/7/2019	Thursday	
2/8/2019	Friday	Project 1-3 due: Initial MBS Build
2/9/2019	Saturday	
2/10/2019	Sunday	

Week Six		
2/11/2019	Monday	Project 1: MBS / VBA (intro)
2/12/2019	Tuesday	
2/13/2019	Wednesday	Project 1: MBS / VBA (intro)
2/14/2019	Thursday	
2/15/2019	Friday	Project 1-4 due: Final MBS Build
2/16/2019	Saturday	
2/17/2019	Sunday	

Week Seven		
2/18/2019	Monday	Project 2: Portfolio Optimization
2/19/2019	Tuesday	
2/20/2019	Wednesday	Project 2: Portfolio Optimization
2/21/2019	Thursday	
2/22/2019	Friday	Project 1-4 due: Peer Evaluation
		Project 2-1 due: Portfolio Statistics
2/23/2019	Saturday	
2/24/2019	Sunday	

Week Eight		
2/25/2019	Monday	Project 2: Portfolio Optimization
2/26/2019	Tuesday	
2/27/2019	Wednesday	Project 2: Portfolio Optimization
2/28/2019	Thursday	
3/1/2019	Friday	Project 2-2 due: Tear Sheet
		Teammate Evaluation due
3/2/2019	Saturday	
3/3/2019	Sunday	

Week Nine		
3/4/2019	Monday	University: Spring Break: No Classes
3/5/2019	Tuesday	University: Spring Break: No Classes
3/6/2019	Wednesday	University: Spring Break: No Classes
3/7/2019	Thursday	University: Spring Break: No Classes
3/8/2019	Friday	University: Spring Break: No Classes
3/9/2019	Saturday	
3/10/2019	Sunday	

Week Ten		
3/11/2019	Monday	WallStreetPrep review
3/12/2019	Tuesday	
3/13/2019	Wednesday	WallStreetPrep review
3/14/2019	Thursday	
3/15/2019	Friday	Project 2-2 due: Peer Evaluation
		WallStreetPrep Assignments due
3/16/2019	Saturday	
3/17/2019	Sunday	

Week Eleven		
3/18/2019	Monday	Project 3: AFN w/ Polar Sport
3/19/2019	Tuesday	
3/20/2019	Wednesday	Project 3: AFN w/ Polar Sport
3/21/2019	Thursday	
3/22/2019	Friday	Project 3-1 due: Initial Polar Sport Build
3/23/2019	Saturday	
3/24/2019	Sunday	

Week Twelve		
3/25/2019	Monday	Project 3: AFN w/ Polar Sport
3/26/2019	Tuesday	
3/27/2019	Wednesday	Project 4: DCF, Valuation, and Presentation
3/28/2019	Thursday	
3/29/2019	Friday	Project 3-2 due: Final Polar Sport Build
3/30/2019	Saturday	
3/31/2019	Sunday	

Week Thirteen		
4/1/2019	Monday	Project 4: DCF, Valuation, and Presentation
4/2/2019	Tuesday	
4/3/2019	Wednesday	Project 4: DCF, Valuation, and Presentation
4/4/2019	Thursday	
4/5/2019	Friday	Project 4 due: DCF / Pitch Update
		Project 3-2 due: Peer Evaluation
4/6/2019	Saturday	
4/7/2019	Sunday	

Week Fourteen		
4/8/2019	Monday	Project 5: Creative Project
4/9/2019	Tuesday	
4/10/2019	Wednesday	Project 5: Creative Project Presentations: Teams 1-7
4/11/2019	Thursday	
4/12/2019	Friday	Project 4 due: Peer Evaluation
4/13/2019	Saturday	
4/14/2019	Sunday	

Week Fifteen		
4/15/2019	Monday	Project 5: Creative Project Presentations: Teams 8-14
4/16/2019	Tuesday	
4/17/2019	Wednesday	Project 5: Creative Project Presentations: Teams 15+
4/18/2019	Thursday	
4/19/2019	Friday	Project 5 due: Creative Project
4/20/2019	Saturday	
4/21/2019	Sunday	

Week Sixteen		
4/22/2019	Monday	Project 5 due: Peer Evaluation (no class)
4/23/2019	Tuesday	
4/24/2019	Wednesday	University: Last Day of Classes (no class)
4/25/2019	Thursday	University: Reading Days - No Exams or Classes
4/26/2019	Friday	University: Reading Days - No Exams or Classes
4/27/2019	Saturday	University: Start of Final Exams
4/28/2019	Sunday	

Course|New for request 14796

Info

Request: New course

Description of request: This is a reactivation request for an existing course number.

Submitter: Richard Lutz rjlutz@ufl.edu

Created: 3/5/2020 1:08:32 PM

Form version: 1

Responses

Recommended Prefix MAR

Course Level 6

Course Number 158

Category of Instruction Intermediate

Lab Code L

Course Title International Marketing

Transcript Title International Marketing

Degree Type Graduate

Delivery Method(s) Off-Campus, Online

Co-Listing No

Effective Term Earliest Available

Effective Year Earliest Available

Rotating Topic? No

Repeatable Credit? No

Amount of Credit 3

S/U Only? No

Contact Type Regularly Scheduled

Weekly Contact Hours 3

Course Description Analysis and strategies for marketing in the international environment

Prerequisites MAR 5805. Designed for M.B.A. students.

Co-requisites None

Rationale and Placement in Curriculum This is an existing course number that is being reactivated. It is a key elective in our Online MBA program.

Course Objectives This course aims to develop your analytical, decision making, and communication skills related to marketing management in a global economy. You will learn major international marketing concepts and develop cross-cultural sensitivities and skills that will enable you to identify, analyze, and address international marketing problems. These include analyzing a foreign market's potential; comparing consumer differences and similarities across markets; decision-making with regard to market entry strategy; defining issues related to marketing mix standardization or adaptation; and evaluating the effects of economic, social, and legal environments on marketing strategy.

Course Textbook(s) and/or Other Assigned Reading Required:

- Course Packets (2) which contain copies of the power point slides for each topic covered in the course and a second one with cases and articles/readings.
- Additional posted materials and lectures available through Canvas.

Recommended:

- Keegan, Warren J. and Mark C. Green, Global Marketing, Pearson, 10th edition, 2020. <https://www.pearson.com/us/higher-education/program/Green-My-Lab-Marketing-with-Pearson-e-Text-Access-Card-for-Global-Marketing-10th-Edition/PGM2569061.html> The prior edition (9th, 2017) is fine as well as the focus is on the concepts and ideas and less on the currency of the data. My lectures and notes will provide information that is more current. <https://www.pearson.com/us/higher->

education/program/Keegan-Global-Marketing-Plus-My-Lab-Marketing-with-Pearson-e-Text-Access-Card-Package-9th-Edition/PGM337692.html

Weekly Schedule of Topics Course Schedule (subject to changes):

Week

Dates

Module Required & Recommended Readings

Assignments

1/19 Introductory Class Meeting (view online) Sign up for teams during the first week

1 1/20 -1/26 1. Introduction to Global Marketing

2. Global Economic Environment

Required:

Course Packet: Modules 1 & 2

Watch: Module 1 & 2 segments

Recommended (Keegan & Green):

Chapter: 1

Sections: 1-1 to 1-5

2 1/27 -2/2 Global Economic Environment (contd.)

Required:

Course Packet: Modules 2

Watch Module 2 segments

Recommended (Keegan & Green):

Chapter: 2

Sections: 2-3 to 2-5

3 2/3 -2/9 3. Global Trade Environment

Required:

Course Packet: Module 3

Watch: Module 3 segments

Recommended (Keegan & Green):

Chapter 3

Sections: 3-1 to 3-8

Quiz 1:

Module 1

4 2/10 -2/16 4. Culture and Consumer Markets

Written Case: Apple's iPhone in India: Ringing in New Fortunes Required:

Course Packet: Module 4

Watch: Module 3 segments

Recommended (Keegan & Green):

Chapter 4

Sections: 4-1 to 4-4

Written Case Report Due

5 2/17 -2/23 5. Segmentation, Targeting & Positioning

Required:

Course Packet: Module 5

Watch: Module 5 segments

Recommended (Keegan & Green):

Chapter 7

Sections: 7-1 to 7-5 Discussion Board 1

6 2/24 -3/1 6. Global Expansion Strategies

Required:

Course Packet: Module 6

Watch: Module 6 segments

Recommended (Keegan & Green):

Chapter 9

Sections 9-1 to 9-5 Quiz 2:

Modules 2, 3 & 4

7 3/2 -3/8 Global Expansion Strategies contd.
See above Discussion Board 2

*Additional readings are posted on the course website for those interested in exploring the topics in more detail.

Week

Dates

Module Required & Recommended Readings

Assignments

8 3/9 -3/15 7. Global Branding and Product Decisions

Required:

Course Packet: Module 7

Watch: Module 7 segments

Recommended (Keegan & Green):

Chapter 10

Sections: 10-1, 10-2, 10-5 Discussion Board 3

9 3/16 -3/22 Global Branding and Product Decisions

Catch up Time See above

10 3/23 -3/29 8. Global Pricing Decisions

Required:

Course Packet: Module 8

Watch: Module 8 segments

Recommended (Keegan & Green):

Chapter 11

Sections: 11-1-11-3, 11-6-11-7, 11-9-11-10 Discussion Board 4

11 3/30 -4/5 9. Global Channel Decisions

Required:

Course Packet: Module 9

Watch: Module 9 segments

Recommended (Keegan & Green):

Chapter 12

Sections: 12-1 -12-3

Quiz 3: Modules 5,6, & 7

12 4/6 -4/12 10. Global Advertising Required:

Course Packet: Module 10

Watch: Module 10 segments

Recommended (Keegan & Green):

Chapter 13

Sections: 13-1-13-4

13 4/13-4/17 Catch Up Time

Quiz 4

Modules: 8, 9 & 10

4/18

In-Class Presentations of Case Projects

Written Case Report & Presentation Due

Grading Scheme Grading and Evaluation:

Individual

(70%) Online Quizzes 50%
Discussion Boards and In-class Discussion

20%

Team

(30%) Team Discussion Board and One-Page Summary

8%

Apple's iPhone in India: Ringing in New Fortunes
Final Case/Project Report & Presentation

6%

16%

Total 100%

Instructor(s) Dr. Jayashree Mahajan

Attendance & Make-up Yes

Accomodations Yes

UF Grading Policies for assigning Grade Points Yes

Course Evaluation Policy Yes

MAR 6930 – INTERNATIONAL MARKETING
Spring 2020

Professor:

Dr. Jayashree Mahajan

Contact Information: mahajan@ufl.edu

(352) 392-9600 (Department Office)

(352) 374-4848 (Home)

Office Location: 264 Stuzin Hall

Office Hours:

By Appointment

Mailing Address: Department of Information Systems & Operations Management

Warrington College of Business Administration

University of Florida

POB 117169

Gainesville, FL 32611-7169

Course Introduction:

The quality of a manager's decisions depends to a large extent on his/her knowledge of and sensitivity to the global marketplace. This course focuses on marketing management issues in the international/global arena. It covers a broad spectrum of issues confronting marketing managers and decision-makers as they design marketing strategy. The issues of interest are examined across various environmental contexts, which will give insight into the diverse landscape that firms operate in. The course explores how global marketing decisions are affected by economic, social, legal, and cultural factors, many of which vary substantially from country to country. Since the course has a managerial focus, the coverage is from the perspective of the individual manager or the firm engaged in global business expansion. The depth of learning will develop your knowledge and expertise in key aspects of international marketing management. As always, you will get the most out of this class through active involvement. My role is to facilitate your learning; real learning will require effort by each one of you applying and extending the ideas introduced through the class material.

Course Objectives :

This course aims to develop your analytical, decision making, and communication skills related to marketing management in a global economy. You will learn major international marketing concepts and develop cross-cultural sensitivities and skills that will enable you to identify, analyze, and address international marketing problems. These include analyzing a foreign market's potential; comparing consumer differences and similarities across markets; decision-making with regard to market entry strategy; defining issues related to marketing mix standardization or adaptation; and evaluating the effects of economic, social, and legal environments on marketing strategy.

Course Materials :

Required:

- Course Packets (2) which contain copies of the power point slides for each topic covered in the course and a second one with cases and articles/readings.
- Additional posted materials and lectures available through Canvas.

Recommended :

- Keegan Warren J and Mark C. Green *Global Marketing* Pearson 10

th
edition, 2020.

<https://www.pearson.com/us/higher-education/program/Green-My-Lab-Marketing-with-Pearson-e-Text-Access-Card-for-Global-Marketing-10th-Edition/PGM2569061.html> The prior edition (9

th
, 2017) is fine as well as the focus is on the concepts and ideas and less on the currency of the data. My lectures and notes will provide information that is more current. <https://www.pearson.com/us/higher-education/program/Keegan-Global-Marketing-Plus-My-Lab-Marketing-with-Pearson-e-Text-Access-Card-Package-9th-Edition/PGM337692.html>

Course Organization and Assignments:

¶ We will use a combination of lectures, discussion boards, quizzes, and an end-of-semester team case project to achieve the course objectives. Rather than merely repeating concepts described in the text, class lectures probe, extend, and apply the material by drawing on a variety of external sources. In discussing various concepts and issues, the emphasis is on their application and interpretation in real world situations. Critical thinking and your active involvement in online discussions are helpful in achieving the course objectives.

As part of the course requires teamwork, plan to form teams of about 5 members during the first week and sign up for your team on Canvas. At the end of the semester, there will be an option to complete peer evaluations so that team assignment grades can be adjusted if the need arises. Please alert me of any major difficulties you encounter with your team members as early as possible. This will enable us to work out a solution without adversely affecting anyone's grade.

Readings : The readings consist of online lectures, current articles/cases and specific sections from the recommended text. All these three sources will facilitate your understanding of the material, although the quizzes primarily draw on material in my online lectures (along with the summary of insights from the discussion board). Given the nature of the course, the lectures cover a large amount of material from various sources so do plan your viewing time. The articles address a contemporary issue and form the basis of the online discussion boards. Additional current and contemporary readings and links are posted on Canvas for each Module, and although these are not required, they will keep you up to date and broaden your understanding of particular issues.

Deliverables : The deliverables consist of participation in and leading a discussion board(s), online quizzes, a final case report and in-class presentation.

- Discussions : Online discussion boards are an important activity in this class. Participating and contributing to these discussion boards will enhance your own and your classmates' learning experience. The discussion will focus on a contemporary reading (see list below and in your packet). Each team will lead a discussion board by preparing and posting slides that (a) summarizes the reading, (b) critically evaluates the article and indicates what they liked least about it, and (c) what they liked best. In some cases outside secondary research will be necessary. Each team will lead and monitor a board (guidelines provided below). Please note that due to the class size it is possible that two boards will run concurrently (e.g., 1A and 1B, 2A and 2B, and so on). Students are divided across the two boards and assigned on the basis of their teams. At the conclusion of the discussion, the leading team will submit a one-page summary of key and novel insights from the discussion (bullet points are acceptable), and a list of the top participants on their board (excluding their team members). Each board will stay open for a week and during that time, everyone in the class (excluding the leading team) will post substantive comments. Each member of the leading team will actively monitor and respond to each of posted comments. Please see the Guidelines on the next page.
- Online Quiz : There will be four online quizzes based primarily on the lectures (in-class and posted on Canvas). The second, third, and fourth quizzes will examine your knowledge in three Modules along with 2 of the discussion boards (primarily the article and the one-page summary of key insights) and they will use a closed-ended multiple-choice format. In order to familiarize you with the testing format, the first quiz is short and covers one Module. All quizzes can be completed at any time up to 2 weeks before the due date.
- Written Case Analyses : You will analyze and prepare two contemporary real world cases in your teams: Apple in India, which the entire class will complete early in the semester and a final case at the end of the semester that is unique to each team. The final project will be from the list of cases provided in the course packet (and listed below). In completing both written cases, you must address all questions listed in the syllabus (see below). At the end of the semester you will analyze a contemporary real world case from the list of cases provided in the course packet (and shown below). In completing the team-based written reports, you must address the listed (see below). Supplementing your analysis using external secondary sources is a good idea (and expected). Your written report must also include an update of the current situation facing the company. The report will be approximately three to five single-spaced pages excluding the update and appendices. References to external sources need to be provided on a separate page (in correct format) and are not included as part of the page limit.
- Case Presentation : Your team will make a short (10-12 minutes) presentation based on the final case/project. The presentations will be during our last meeting. These presentations are an invaluable learning opportunity of how companies pursue international opportunities and it is a great way to end the course. Please prepare to discuss and participate during this last class.

Grading and Evaluation :

Individual (70%)	Online Quizzes	50%
Team	Discussion Boards and In-class Discussion	20%

Team (30%)	Team Discussion Board and One-Page Summary	0%
		Apple's iPhone in India: Ringing in New Fortunes Final Case/Project Report & Presentation
Total		100%

Instructions and Guidelines for the Discussion Boards :

The discussion board is meant to be a way for all of us to learn from one another. Here are some guidelines (which will also be used in assigning points):

For the team that is leading the discussion:

- Slides: Provide sufficient details either on the slides or in the note pages of the slides. Provide questions or ideas for students to think about that will stimulate a discussion. Use outside research if more details would help. Submit slides by the due date on Canvas so I can post them on the board in time.
- Management: The team will remain active on the board and respond to individual posts by others in the class. One possible approach that I have seen teams use in the past: Assign 1 person to day 1-2, another to days 3-4, and then days 5-7 remaining team members can double up.
- Responses: Provide feedback and a specific response for all novel and new comments. Posts that extend an earlier post need to be responded to. Posts that summarize earlier comments or your slides only need a one or two line acknowledgment (and a reference to your slides or to a prior post).
- Summary: Provide a one-page summary of new insights that emerged from the discussion. It can be in bullet form. Your summary is an important take-away for the class. Also provide a list of the top 10 participants in your board.

General comments for everyone:

- Keep your comments to no more than one or two short paragraphs (everyone has limited time). Longer posts could result in a loss of points
- Prepare your initial post so it is carefully written and well-articulated
- Posting once is required although you are not limited in the number of times you can post on any discussion board
- Your comments must relate to the reading/article that is being discussed
- Your views and opinions must be backed by your reasons or rationale
- Your experiences in your position and company (even if it is small and unknown) are valuable for others to read about
- Your personal experiences are also very valuable providing they relate to the topic being discussed
- It is an excellent idea to provide links to new information, however a link by itself is not useful and you must summarize the key points in your post (as everyone has limited time).
- Always try to look at an issue from an economic and/or social welfare perspective (not a political perspective)
- Follow-up comments of agreement and disagreement (with reasons provided) and extending someone's ideas are as valuable and are an alternative to completely new idea
- Humor is always a good idea (and looked upon favorably) provided it relates to the discussion

Course Schedule (subject to changes):

Week	Dates	Module	Required & Recommended Readings	Assig
	1/19	Introductory Class Meeting (view online)		Sign u during week
1	1/20 -1/26	<u>Introduction to Global Marketing</u> <u>Global Economic Environment</u>	<u>Required</u> : Course Packet: Modules 1 & 2 Watch: Module 1 & 2 segments <u>Recommended</u> (Keegan & Green): Chapter: 1 Sections: 1-1 to 1-5	
2	1/27 -2/2	<u>Global Economic Environment (contd.)</u>	<u>Required</u> : Course Packet: Modules 2 Watch Module 2 segments <u>Recommended</u> (Keegan & Green): Chapter: 2 Sections: 2-3 to 2-5	
3	2/3 -2/9	<u>Global Trade Environment</u>	<u>Required</u> : Course Packet: Module 3 Watch: Module 3 segments <u>Recommended</u> (Keegan & Green): Chapter 3 Sections: 3-1 to 3-8	Quiz 1 Modul
4	2/10 -2/16	<u>Culture and Consumer Markets</u>	<u>Required</u> : Course Packet: Module 4	Written

		<u>Written Case:</u> Apple's iPhone in India: Ringing in New Fortunes	Watch: Module 3 segments <u>Recommended</u> (Keegan & Green): Chapter 4 Sections: 4-1 to 4-4	Repor
5	2/17 -2/23	<u>Segmentation, Targeting & Positioning</u>	<u>Required</u> : Course Packet: Module 5 Watch: Module 5 segments <u>Recommended</u> (Keegan & Green): Chapter 7 Sections: 7-1 to 7-5	Discus 1
6	2/24 -3/1	<u>Global Expansion Strategies</u>	<u>Required</u> : Course Packet: Module 6 Watch: Module 6 segments <u>Recommended</u> (Keegan & Green): Chapter 9 Sections 9-1 to 9-5	Quiz 2 Modul
7	3/2 -3/8	<u>Global Expansion Strategies contd.</u>	See above	Discus 2

* Additional readings are posted on the course website for those interested in exploring the topics in more detail.

Week	Dates	Module	Required & Recommended Readings	Assig
8	3/9 -3/15	<u>Global Branding and Product Decisions</u>	<u>Required</u> : Course Packet: Module 7 Watch: Module 7 segments <u>Recommended</u> (Keegan & Green): Chapter 10 Sections: 10-1, 10-2, 10-5	Discus 3
9	3/16 -3/22	<u>Global Branding and Product Decisions</u> Catch up Time	See above	
10	3/23 -3/29	<u>Global Pricing Decisions</u>	<u>Required</u> : Course Packet: Module 8 Watch: Module 8 segments <u>Recommended</u> (Keegan & Green): Chapter 11 Sections: 11-1-11-3, 11-6-11-7,11-9-11-10	Discus 4
11	3/30 -4/5	<u>Global Channel Decisions</u>	<u>Required</u> : Course Packet: Module 9 Watch: Module 9 segments <u>Recommended</u> (Keegan & Green): Chapter 12 Sections: 12-1 -12-3	Quiz 3 5,6, &
12	4/6 -4/12	<u>Global Advertising</u>	<u>Required</u> : Course Packet: Module 10 Watch: Module 10 segments <u>Recommended</u> (Keegan & Green): Chapter 13 Sections: 13-1-13-4	
13	4/13-4/17	Catch Up Time		Quiz 4 Modul
	4/18	In-Class Presentations of Case Projects		Written Repor Prese

Important Dates:

Assignments

Earliest Submission Date
(9 a.m.)

Final Submission Date
(11 p.m.)

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Quiz 1: Modules 1	Monday, January 27 th	Sunday, February 9 th
Apple in India Written Case Report	-	Sunday, February 16 th
Discussion Board 1*	Thursday, February 20 th	Wednesday February 26 th
Quiz 2: Modules 2, 3, & 4	Monday, February 17 th	Sunday, March 1 st
Discussion Board 2*	Thursday, March 5 th	Wednesday, March 11 th
Discussion Board 3*	Thursday, March 12 th	Wednesday, March 18 th
Discussion Board 4*	Thursday, March 26 th	Wednesday, April 1 st
Quiz 3: Modules 5, 6, & 7, DB # 1, 2	Monday, March 23 rd	Sunday, April 5 th
Quiz 4: Modules 8, 9, & 10, DB # 3, 4	Saturday, April 3 rd	Friday, April 17 th
Case Project Presentation	-	Saturday, April 18 th Noon
Case Project Written Report	-	Saturday, April 18 th Noon
Peer Evaluations (optional)	-	Sunday, April 19 th

* Each team will submit their one-page key takeaways and their top ten list on the Friday after the board closes

Academic Honesty, Accommodations for Students with Disabilities, Course Evaluations

- This course follows general university policy regarding academic honesty (Please refer to the University of Florida's Student Honor Code: <http://www.dso.ufl.edu/judicial/honorcode.php>)
- Students with disabilities who experience learning barriers and would like to request academic accommodations should connect with the disability Resource Center by visiting <https://disability.ufl.edu/students/get-started/> . It is important for students to share their accommodation letter with their instructor and discuss their access needs, as early as possible in the semester.
- Students are expected to provide professional and respectful feedback on the quality of instruction in this course by completing course evaluations online via GatorEvals. Guidance on how to give feedback in a professional and respectful manner is available at gatorevals.aa.ufl.edu/students/. Students will be notified when the evaluation period opens, and can complete evaluations through the email they receive from GatorEvals, in their Canvas course menu under GatorEvals. Summaries of course evaluation results are available to students at gatorevals.aa.ufl.edu/public-results/

Getting Help

For technical difficulties with E-learning please contact the UF Help Desk at:

- Learning-support@ufl.edu
- (352) 392-HELP - select option 2
- <https://lss.at.ufl.edu/help.shtml>

For access to UF Libraries

- Off Campus Access: <http://www.uflib.ufl.edu/ufproxy.html>
- Link for Online Resources for the course: <http://businesslibrary.uflib.ufl.edu/internationalbusiness>
- Business Librarian: Peter McKay pzmckay@ufl.edu

Other resources are available at <http://www.distance.ufl.edu/getting-help>

- Counseling and Wellness resources
- Disability resources

Requirements for class attendance and make-up exams, assignments, and other work in this course are consistent with university policies that can be found at:

<https://catalog.ufl.edu/ugrad/current/regulations/info/attendance.aspx> .

Original file: Syllabus_MAR6930_2020.docx

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Students with disabilities requesting accommodations should first register with the Disability Resource Center (352-392-8565, www.dso.ufl.edu/drc/) by providing appropriate documentation. Once registered, students will receive an accommodation letter which must be presented to the instructor when requesting accommodation. Students with disabilities should follow this procedure as early as possible in the semester. _

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Information on current UF grading policies for assigning grade points:

- <https://catalog.ufl.edu/ugrad/current/regulations/info/grades.aspx>

Students are expected to provide professional and respectful feedback on the quality of instruction in this course by completing course evaluations online via GatorEvals. Guidance on how to give feedback in a professional and respectful manner is available at <https://gatorevals.a.ufl.edu/students/> . Students will be notified when the evaluation period opens, and can complete evaluations through the email they receive from GatorEvals, in their Canvas course menu under GatorEvals, or via <https://ufl.bluera.com/ufl/> . Summaries of course evaluation results are available to students at <https://gatorevals.a.ufl.edu/public-results/> .

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Readings for Discussion Boards

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1. Ghemawat, Pankaj and Steven A. Altman (2019), “The State of Globalization in 2019, and What it Means for Strategists,” *Harvard Business Review*, February 6th, 2019. (#H04RLJ)
 2. Kaplan, Robert S., George Serafaim, and Eduardo Tugendhat (2018), “Inclusive Growth: Profitable Strategies for Tackling Poverty and Growth,” *Harvard Business Review*, January-February, 2018. (#R1801K)
 3. Meyer, Erin (2017), “Being the Boss in Brussels, Boston, Beijing,” *Harvard Business Review*, July-August, 2017. (#R1704D)
 4. Yu, Howard (2018), “For Some Platforms, Network Effects Are No Match for Local Know-How,” *Harvard Business Review*, July 26, 2018. (#H04GIH)
 5. Brennan, Louis (2018), “How Netflix Expanded to 190 Countries in 7 Years,” *Harvard Business Review*, October 12, 2018. (#H04LEY)
 6. Greevan, Mark J., George S. Yip, Wei Wei (2019), “Understanding China’s Next Wave of Innovation,” *MIT Sloan Management Review* , Spring 2019. (#SMR750)
 7. Cristensen, Clayton, Efosa Ojomo, and Karen Dillon (2019), “Cracking Frontier Markets,” *Harvard Business Review*, January-February, 2019. (#R1901F)
 8. Greyser, Stephen A. and Mats Urde (2019), “What Does Your Corporate Brand Stand For?” *Harvard Business Review*, January-February, 2019. (#R1901E)
 9. Leke, Acha and Saf Yeboah-Amankwah (2018), “Africa: A Crucible for Creativity,” *Harvard Business Review*, November-December, 2018. (#R1806J)
 10. Zeng, Ming (2018), “Alibaba and the Future of Business: Lessons from China’s Digital Giant,” *Harvard Business Review*, September-October 2018. (#R1805F)

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Cases for Written Projects & Presentations

Apple’s iPhone in India: Ringing in New Fortunes (#W18030)

In September 2016, Apple prepared to launch a new version of its flagship product, the iPhone 7. The new product, termed "the best, most advanced iPhone ever," was priced at three times its cost in the U.S. market. However, Apple had witnessed an 18 per cent year-on-year dip in iPhone revenues in the first calendar quarter of 2016, dragging down Apple's revenues for the first time in 13 years. The leader in the smartphone market was ousted from its number one position in fiscal year 2016 by the Samsung Group, which had a 20.5 per cent market share. A multitude of factors had caused a dip in the sales of iPhones in the United States and China-Apple's key markets. Apple was now eyeing India, the third-largest smartphone market in the world, to replicate its China growth story. The India launch of the iPhone 7 was planned for October 7, 2016. The base model was priced at the equivalent of over US\$900, about 39 per cent higher than the U.S. phone price. Did Apple have the pricing power to charge more than three times the cost of the iPhone in the Indian market? What would be Apple's best pricing strategy in a market like India? How could Apple grow its revenues and profits in one of the fastest-growing smartphone markets in the world?

1. Does Apple have a dominant (or even a monopoly) position in the global smartphone market? Has it changed over the years 2014-2016? In discussing this questions, provide an overview of the key global players and Apple’s position in this competitive landscape.
2. What are the likely constraints on Apple’s position in the Indian smartphone market? Describe such factors as the nature of the consumer demand (awareness, elasticity, penetration) and the players/competitors.

3. Explain Apple's high profitability in the global smartphone market.
4. What should Apple's pricing strategy be for its iPhone in India?
5. Provide an update of Apple's position in India.

IKEA in China: An Arduous Journey (#W18488)

IKEA, the world's largest furniture retailer, entered the Chinese market in 1998; however, it did not turn a profit in the first 10 years. Although anticipating lower profits, IKEA did not anticipate that Chinese customers would be confused about IKEA's value proposition. After 2007, IKEA adopted several strategies to adjust for the Chinese market and achieve a better performance. These adjustments made IKEA more profitable in the Chinese market. IKEA accelerated its expansion in China with a plan to open three stores every year for a total of 40 stores before 2020. Still, in 2017, the Chinese market presented IKEA with challenges, such as cheap imitations from competitors and increasing interest in e-commerce by consumers. Could the strategies IKEA used to improve its performance in the past sustain the company in the years ahead?

1. Describe the general situation for IKEA in China since 2008 in terms of the customers, competitors, and suppliers.
2. As compared to its major competitors in the industry, what measures can IKEA take to become more profitable?
3. What major strategies did IKEA adopt when it first entered the Chinese market and how were those different from strategies in Europe/United States?
4. What are the main concerns IKEA should consider for future expansion in China?
5. Can IKEA's current strategic momentum facilitate its long-term growth? How can it respond to new market trends such as online retail? Provide an update of Ikea's position in China.

Stella Artois in South Africa: Cause Marketing and the Building of a Global Brand (#KE1132)

Stella Artois, an AB InBev brand, is the world's best-selling Belgian beer. In early 2017, Ricardo Tadeu, AB InBev Zone President for Africa, is planning the brand's entry into its next export market: South Africa. The case explores Stella's introduction strategies into three of its export markets---the UK (1976), the US (2000), and Mexico (2016) --- examining the drivers of the brand's success as well as its failures. We will analyze the brand's previous launches to determine what made it successful in some markets and not in others and how these experiences help in developing a strategy for the brand's introduction to the South African market. While the focus is on growth through international expansion, it also deals with the issues of brand positioning for premium products, changing consumer perceptions, the use of cause marketing, category development and maturity, and competitive strategy.

1. Provide background information on global beer consumption, and the history of Stella Artois as a company and brand. How does a market development strategy serve as a guide for growing both beer category volume and brand sales?
2. What did the company learn from Stella's early positioning and image problems in the UK market? How did that help in the US market?
3. What went wrong with the Mexico market launch? Was it appropriate?
4. In planning for the South African launch, what did Tadeu's team learn from the BALAD campaign in other markets (e.g., U.S. and Mexico)? What are the pros and cons of centering the introduction activities on Stella's global sponsorship of Water.org?
5. Under what circumstances and in which markets do you think cause marketing can be most successful? Provide an update of Stella's current positioning and how it is performing.

Costco Wholesale Corporation: Market Expansion and Global Strategy (#W19041)

In 2015, Costco Wholesale Corporation (Costco) was ranked as one of the world's largest global retailers based on sales revenue, second only to Walmart Inc. It had successfully expanded into eight international markets: Canada, Japan, South Korea, Spain, Mexico, Taiwan, Australia, and the United Kingdom, managing to grow despite the turbulent economic conditions prevalent in these countries. Costco challenged stereotypes and employed unconventional business strategies to position itself as a leading transnational retailer. Costco's business model was crucial to the company's financial success and expansion over the years. Company success factors included its membership-based operating model, its focus on low-cost efficiencies, the perceived quality and value of the Kirkland Signature brand, and its philosophy of rewarding human capital. However, as Costco made plans to expand its operations, it faced challenges due to intensified competition in the global retail industry and policies and regulations in local markets that restricted big box retailers. In this context of uncertain international markets, which markets should it enter next? What was the best entry method for each individual market?

1. Analyze the competitive nature of the dynamic global retail industry over the last two decades.
2. Given the different modes of entry for global expansion, discuss and evaluate Costco's mode of entry in the various markets in which it is operating. What ideal mode would you recommend for new markets?
3. Analyze the key success factors contributing to Costco's superior performance and the key challenges it faces in its eight markets.

4. What future strategy would you recommend for Costco to overcome the strategic challenges it faces?
5. Should Costco enter India and China? Provide reasons and recommendations. Provide an update of Costco's strategy and performance in the international markets.

Geely versus Ford: Threat From an Emerging Market Multinational to a Market Leader (#W18750)

In 2010, when China surpassed the United States to become the largest global market for automobiles, China's Geely Automobile Holdings Ltd. (Geely) entered the global automobile industry by acquiring Volvo Group's cars division from Ford. Seven years later, Geely bought a controlling stake of 51 per cent in Lotus Cars, a stake in the truck maker AB Volvo, and a 10 per cent share of Daimler AG worth US\$9 billion, becoming its largest shareholder. On August 31, 2018, Ford's chief executive officer faced a strategic challenge: to assess the level of threat that Geely posed and how Ford needed to respond to it. Was Geely's rise in the market endangering Ford's market position?

1. What are Ford's challenges and opportunities in the domestic and international markets?
2. Describe the both the global and domestic industry context that Ford is operating in and that are facing Hackett.
3. What is the effect of rising Emerging Market Multinationals and other disruptors (e.g., electrical vehicles, ride-hailing services) on established global companies like Ford?
4. What approaches would you recommend that Hackett adopt to grow sales and favorably impacting Ford's stock price? Should they take Geely seriously, use Geely's threat to garner support in the domestic market, or ignore the threat?
5. Provide an update of both Ford and Geely's strategies and performance in China.

Africa: Making Cash and Alternative Payments Work in Kenya through Contextual Leadership (#W191128)

On September 30, 2017, the general manager (GM) of Uber Technologies Inc. (Uber) for sub-Saharan Africa, arrived in Nairobi, Kenya, and paid for his Uber service with cash. This functionality of the Uber app represented a new business model for Uber. The GM had to convince global management of the business case for offering cash payment options in Africa; he did so by conducting experiments and showing data that indicated rider numbers had tripled with adoption of the cash payment option. Uber's driver-partners were concerned about safety when they transported passengers who paid by cash, both because credit card payments offered Uber rider identification and because the driver-partners were concerned about driving around with large amounts of cash. In spite of their concerns, the rationale for introducing a cash payment option was relevant, and it had to be considered carefully in the context of African locations with high crime rates. The GM considered various initiatives for utilizing data from their technology platform to safeguard their riders and drivers. They needed to address local needs in Africa while adhering to global Uber standards.

1. Provide a background and brief analysis of Uber's international expansion strategy.
2. How would you describe the innovation process adopted by the parent firm Uber Global in adapting to the Kenyan market?
3. Analyze Uber's business model in Africa, focusing on the critical success factors and challenges.
4. How can Uber continue to improve its business model in Africa?
5. Provide an update of Uber's presence in the international markets and in Africa.

The Airbnb Business Travel Vertical in Asia: The Way Forward (#W17599)

In March 2017, Airbnb needed to make some important decisions regarding its strategy for the Airbnb Business Travel Vertical (ABTV) in Asia. Despite a short history of less than three years since the formal announcement of its launch, the ABTV had exhibited promising performance. The business travel market offered many attractive characteristics, including its large size. Despite the attractiveness of the business travel segment, two issues related to the choice of countries and the choice of segments were of concern. Another key issue related to identifying the specific corporate clients to approach—whether to leverage existing relationships with multinational customers or to approach Asian corporate clients directly.

1. How would you categorize Airbnb's entry into the business travel market? Does it represent product extension or diversification? Comment on the differences in terms of customers, competitors, and capabilities required.
2. What is the attraction of the Asian business travel market? Discuss this broadly and with references to specific geographic markets.
3. What competencies does Airbnb bring to the Asian business travel market?
4. What should be ABTV's strategy for acquiring Asian business travelers? Examine this from the point of view of which types of corporate clients and markets to prioritize.
5. Provide an update of the ABTV market more globally in and in Asia.

Zara in China and India (# SMU-18-0003)

1. Compare and contrast the target segment and value proposition of Zara, against its key competitors H&M and Uniqlo.

2. What makes the supply chain management at Zara unique? What comparative benefits and drawbacks does this have vis-s-vis the competition? And, how is this reflected in the performance indicators of the three competitors, H&M, Uniqlo, and Zara?
3. What are some of the unique key elements of Zara's business model and market strategy? How do they help sustain Zara's value proposition?
4. How does the store and sales footprint of Zara across regions/countries compare with the market potential? What accounts for their differing performances in China versus India?

Samsung Mobile: Market Share and Profitability in Smart Phone (#W16620)

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In December 2015, South Korean technology giant Samsung announced a new head to its mobile division. The announcement came on the heels of a challenging year for Samsung. Two handset launches that year had received criticism in the press for the way they were handled. The appointment was interpreted by many in the industry as Samsung signaling a desire to further intensify innovation in an increasingly commoditized product area. This was a time of intense challenge but also great promise. Complex questions involving significant trade-offs had to be answered. Should the mobile division push for profitability or market share? Were those objectives mutually exclusive? What was the best strategy for obtaining the chosen objective? How could Samsung differentiate itself in an increasingly crowded, competitive, and commoditized market?

1. Where is the smartphone in its current product life cycle, and how should that position influence Samsung in its strategy moving forward?
2. Should Samsung pursue profitability, even at the expense of market share?
3. Are Samsung's smartphones differentiated products? If yes, why? If not, what should Samsung do about it?
4. Should Samsung pursue a multiple segment strategy or a globally undifferentiated strategy? If the company should pursue a multiple segment strategy, what criteria should it use?

Course|New for request 14785

Info

Request: MARKETING ANALYTICS 1 - APPROVAL

Description of request: Approve new marketing course and assign course number.

Submitter: Shawn Lee shawn.lee@warrington.ufl.edu

Created: 3/5/2020 10:41:59 AM

Form version: 3

Responses

Recommended Prefix MAR

Course Level 6

Course Number XXX

Category of Instruction Intermediate

Lab Code None

Course Title MARKETING ANALYTICS 1

Transcript Title MARKETING ANALYTICS 1

Degree Type Graduate

Delivery Method(s) On-Campus

Co-Listing No

Effective Term Earliest Available

Effective Year Earliest Available

Rotating Topic? No

Repeatable Credit? No

Amount of Credit 2

S/U Only? No

Contact Type Regularly Scheduled

Weekly Contact Hours 2

Course Description Marketers today typically have access to a large amount of data with different formats. Properly analyzing these data will help managers better understand the marketplace and improve their decision-making, such as pricing, advertising budget allocation, and product recommendation.

Prerequisites Course Prerequisites

A key prerequisite for this course is a basic understanding of the statistical programming language R. It is expected that students will have completed one of the following:

- The R Bootcamp course from the MS ISOM Business Analytics curriculum
- An online introductory course in R, such as those offered by Coursera, Udemy, DataCamp, or an equivalent
- Significant self-taught preparation in R utilizing an introductory text or similar web-based tutorial

A second key prerequisite is an adequate background in math and statistics appropriate for the topic. Although this course will focus on the logics and business applications of the statistical tools for marketing analytics rather than the mathematical details, students are expected to have some mathematical and statistical backgrounds to fully handle the statistical tools. Basic statistical and probability courses are essential. Basic integral calculus courses are highly recommended.

The third prerequisite is an adequate laptop capable of operating both Microsoft Excel and the statistical programming scripting language R. In addition to R, the class will utilize the Integrated Development Environment (IDE) for R – RStudio. Both R and RStudio are open source software

capable of operating on Windows-based and Apple-based operating systems.

Co-requisites N/A

Rationale and Placement in Curriculum This course is an upper level analytics course to be offered to Master of Science in Business Analytics, MBA, and other specialized Masters Programs in the Hough Graduate School of Business.

Course Objectives Course Objectives

This ultimate objective of this course is that you can understand the efforts of a Marketing Analytics team, interpret results of Marketing Analytics models, and translate those model outcomes into actionable recommendations for decision-makers within the firm.

The ultimate objective of the course would be for you to be confident being part of a marketing analytics team, interpret the results of a marketing analytics analysis and make a decision for your firm. To prepare you to act in one of these roles, you will be exposed to and participate in the key processes that are used commercially to perform and explain marketing analytic efforts. Specific objectives of the course are:

- 1) Utilize the statistical program R to solve specific marketing analytics problems.
- 2) Illustrate variable distributions and appropriate model outcomes visually.
- 3) Extract and utilize large datasets from the Internet to perform analytics modeling.
- 4) Make appropriate recommendations based on the outcome of the marketing analytics modeling effort.

Course Textbook(s) and/or Other Assigned Reading Chapman, C. and Feit, E. (2019). R for Marketing Research and Analytics. Switzerland AG: Springer Nature

Weekly Schedule of Topics

Week	Class	Date	Topics	Assignments
1	Session 1	TBD	Class Logistics, Introduction to Marketing Analytics	Class Logistics, Introduction to Marketing Analytics
				<ul style="list-style-type: none">• Reading: Class Notes on Canvas• Assignment: Loading and converting code retrieved from the web for marketing applications (i)
1	Session 2	TBD	Utilizing R and RStudio to perform Marketing Analytics	Utilizing R and RStudio to perform Marketing Analytics
				<ul style="list-style-type: none">• Reading: Chapter 2 – R for Marketing Research and Analytics• Assignment: Creating a simple function in R (i)
2	Session 3	TBD	Data visualization of variables using R, ggplot2, and the car scatterplot matrix	Data visualization of variables using R, ggplot2, and the car scatterplot matrix
				<ul style="list-style-type: none">• Reading: Chapter 4 – R for Marketing Research and Analytics• Assignment: Building and interpreting variable distributions and relationships (i)
2	Session 4	TBD	Customer Segmentation methods in R	Customer Segmentation methods in R
				<ul style="list-style-type: none">• Reading: Chapter 6 – R for Marketing Research and Analytics• Assignment: Comparing groups and interpreting meaning of comparisons (i)
3	Session 5	TBD	Linear regression in R	Linear regression in R
				<ul style="list-style-type: none">• Reading: Chapter 7 – R for Marketing Research and Analytics• Assignment: Building and interpreting a linear regression model (i)
3	Session 6	TBD	Linear regression in R with Marketing Use Cases	Linear regression in R with Marketing Use Cases
				<ul style="list-style-type: none">• Reading: Class Notes on Canvas• Assignment: Creating a linear regression model with a marketing use case and data (t)
4	Session 7	TBD	Midterm Exam	In Class Midterm Exam
4	Session 8	TBD	Bass Model for New Product diffusion	Bass Model for New Product diffusion
				<ul style="list-style-type: none">• Reading: Chapters 4 & 6 – Class Notes on Canvas• Assignment: Quiz on Canvas about Bass Model Understanding (i)
5	Session 9	TBD	Generalized Bass Model	Generalized Bass Model
				<ul style="list-style-type: none">• Reading: Class Notes on Canvas• Assignment: Interpreting a Bass Model Output (i)
5	Session 10	TBD	Demand Curves and Estimating Pricing	Demand Curves and Estimating Pricing
				<ul style="list-style-type: none">• Reading: Class Notes on Canvas• Assignment: Building a demand curve (i)
6	Session 11	TBD	SCAN PRO model, optimal pricing	SCAN PRO model, optimal pricing
				<ul style="list-style-type: none">• Reading: Class notes on Canvas• Assignment: Quiz on Canvas about a Scan Pro model output (i)

- 6 Session 12 TBD Conjoint Analysis • Reading: Chapter 13 – R for Marketing Research and Analytics
 - Assignment: Key elements of a successful conjoint analysis (i)
- 7 Session 13 TBD Forecasting Sales • Reading: Chapter 11 – Predictive Marketing
 - Assignment: Final Team Project (t)
 - Final Exam Review
- 7 Session 14 TBD Final Exam • In class Exam (i)

Grading Scheme

Grade	Grade Point Average	Score
(in percent)		
A	4.00	94.0 or above
A-	3.67	90.0-93.9
B+	3.33	87.0-89.9
B	3.00	84.0-86.9
B-	2.67	80.0-83.9
C+	2.33	77.0-79.9
C	2.00	74.0-76.9
C-	1.67	70.0-73.9
D	1.00	60.0-69.9
E	0.00	Less than 60.0

Instructor(s) Jim Hoover
Attendance & Make-up Yes
Accommodations Yes
UF Grading Policies for assigning Grade Points Yes
Course Evaluation Policy Yes

Marketing Analytics 1

Professor: Dr. Jim Hoover

Office:

Stuzin 264

Telephone: 352-294-0410

Email:

jim.hoover@warrington.ufl.edu

Office Hours: TBD (Schedule an appointment by email)

Term:

TBD

Section:

TBD

Location: TBD

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Course Description

Marketers today typically have access to a large amount of data with different formats. For example, supermarket managers have scanner data for thousands of daily transactions of hundreds of products, and online content providers have rating data of their contents from thousands of customers. Properly analyzing these data will help managers better understand the marketplace and improve their decision-making, such as pricing, advertising budget allocation, and product recommendation.

Throughout the class, students will learn to develop statistical thinking for marketing analytics, analyze datasets typically encountered in consulting and marketing situations, and utilize the analysis results for marketing decision-makings. Some topics that will be covered in class are:

- Use product sales data to forecast the trajectory of product adoption.
- Use individual-consumer data to achieve consumer segmentation.
- Use product-level sales data to assess the brand demand
- Optimize a firm's pricing and promotion strategies

Course Objectives

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This ultimate objective of this course is that you can understand the efforts of a Marketing Analytics team, interpret results of Marketing Analytics models, and translate those model outcomes into actionable recommendations for decision-makers within the firm.

The ultimate objective of the course would be for you to be confident being part of a marketing analytics team, interpret the results of a marketing analytics analysis and make a decision for your firm. To prepare you to act in one of these roles, you will be exposed to and participate in the key processes that are used commercially to perform and explain marketing analytic efforts. Specific objectives of the course are:

- 1) Utilize the statistical program **R** to solve specific marketing analytics problems.
- 2) Illustrate variable distributions and appropriate model outcomes visually.
- 3) Extract and utilize large datasets from the Internet to perform analytics modeling.
- 4) Make appropriate recommendations based on the outcome of the marketing analytics modeling effort.

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Course Prerequisites

A key prerequisite for this course is a basic understanding of the statistical programming language R. It is expected that students will have completed one of the following:

- The R Bootcamp course from the MS ISOM Business Analytics curriculum
- An online introductory course in R, such as those offered by Coursera, Udemy, DataCamp, or an equivalent
- Significant self-taught preparation in R utilizing an introductory text or similar web-based tutorial

A second key prerequisite is an adequate background in math and statistics appropriate for the topic. Although this course will focus on the logics and business applications of the statistical tools for marketing analytics rather than the mathematical details, students are expected to have some mathematical and statistical backgrounds to fully handle the statistical tools. Basic statistical and probability courses are essential. Basic integral calculus courses are highly recommended.

The third prerequisite is an adequate laptop capable of operating both Microsoft Excel and the statistical programming scripting language **R**. In addition to R, the class will utilize the Integrated Development Environment (IDE) for **R** – RStudio. Both **R** and RStudio are open source software capable of operating on Windows-based and Apple-based operating systems.

Weekly Course Schedule of Topics and Assignments

Holidays – TBD

Week	Class	Date	Topics	Assignments
1	Session 1	TBD	Class Logistics, Introduction to Marketing Analytics	Reading: Class Notes on Canvas Assignment: Loading and converting code retrieved from the web for marketing applications (i)
1	Session 2	TBD	Utilizing R and RStudio to perform Marketing Analytics	Reading: Chapter 2 – R for Marketing Research and Analytics Assignment: Creating a simple function in R (i)
2	Session 3	TBD	Data visualization of variables using R, ggplot2, and the car scatterplot matrix	Reading: Chapter 4 – R for Marketing Research and Analytics Assignment: Building and interpreting variable distributions and relationships (i)
2	Session 4	TBD	Customer Segmentation methods in R	Reading: Chapter 6 – R for Marketing Research and Analytics Assignment: Comparing groups and interpreting meaning of comparisons (i)
3	Session 5	TBD	Linear regression in R	Reading: Chapter 7 – R for Marketing Research and Analytics Assignment: Building and interpreting a regression model (i)
3	Session 6	TBD	Linear regression in R with Marketing Use Cases	Reading: Class Notes on Canvas Assignment: Creating a linear regression with a marketing use case and data (t)
4	Session 7	TBD	Midterm Exam	In Class Midterm Exam
4	Session 8	TBD	Bass Model for New Product diffusion	Reading: Chapters 4 & 6 – Class Notes on Canvas Assignment: Quiz on Canvas about Bass Understanding (i)
5	Session 9	TBD	Generalized Bass Model	Reading: Class Notes on Canvas Assignment: Interpreting a Bass Model Output (i)
5	Session 10	TBD	Demand Curves and Estimating Pricing	Reading: Class Notes on Canvas Assignment: Building a demand curve (i)
6	Session 11	TBD	SCAN PRO model, optimal pricing	Reading: Class notes on Canvas Assignment: Quiz on Canvas about a SCAN PRO model output (i)
6	Session 12	TBD	Conjoint Analysis	Reading: Chapter 13 – R for Marketing Research and Analytics Assignment: Key elements of a successful conjoint analysis (i)
7	Session 13	TBD	Forecasting Sales	Reading: Chapter 11 – Predictive Marketing Assignment: Final Team Project (t) Final Exam Review
7	Session 14	TBD	Final Exam	In class Exam (i)

Legend: (i) = individual assignment; (t) = team assignment

Evaluation and Grading Criteria

The current grading plan is listed below. Class participation is inclusive of both attendance as well as providing meaningful discussion during class. There is a total of 450 points currently planned during the course. The breakout of the points by assignment follows:

Graded Activity	Effort	Points per Assignment
Loading and converting code retrieved from the web for marketing applications	Individual	15
Creating a simple function in R	Individual	20
Building and interpreting variable distributions and relationships	Individual	15

Building and interpreting variable distributions and relationships	Individual	15
Comparing groups and interpreting meaning of comparisons	Individual	20
Building and interpreting a linear regression model	Individual	15
Creating a linear regression model with a marketing use case and data	Team	35
In Class Midterm Exam	Individual	75
Quiz on Canvas about Bass Model Understanding	Individual	20
Interpreting a Bass Model Output	Individual	15
Building a demand curve	Individual	20
Quiz on Canvas about a Scan Pro model output	Individual	20
Key elements of a successful conjoint analysis	Individual	20
Final Team Project	Team	50
Class Participation	Individual	10
Final exam	Individual	100
Total Points		450

Criteria for grading activities will be provided on Canvas along with specific directions for completing the activity.

Free Rider Assessment

Because almost 20% of the grade in this course is determined by team participation, an assessment of contributions by each member of each team will be collected as part of the Final Team Recommendation Report. Members who are assessed as not contributing equitably to the team projects will receive an individual adjustment to the team assignment grades. Team members are encouraged to confidentially identify problems within teams to me early in the team assignments. This permits there to be an opportunity to intervene with team members before the final assessment is submitted.

Late or Missed Assignments

Late or missed assignments may not receive full point credit or may be assigned 0 points. Contact me if you know in advance that you will be late with an assignment or will miss an assignment (typically due to an excused absence). Acceptable notification and my concurrence with the reasons for the late or missing assignment will receive more favorable treatment than notification after an assignment is due.

If you have technical issues that prevent you from submitting assignments on schedule, please ensure that you contact the TAC Student Information Technology Support Center to document your problem and help resolve the issue. Information on how to contact Student Support can be found at:

<https://warrington.ufl.edu/information-technology-support-programs/technical-services/tac-student-support/>

Grading Scale and Grading Policies for Assigning Grade Points

The grading scale will be as follows:

Grade	Grade Point Average	Score (in percent)
A	4.00	94.0 or above
A-	3.67	90.0-93.9
B+	3.33	87.0-89.9
B	3.00	84.0-86.9
B-	2.67	80.0-83.9
C+	2.33	77.0-79.9
C	2.00	74.0-76.9
C-	1.67	70.0-73.9
D	1.00	60.0-69.9
E	0.00	Less than 60.0

I reserve the right to adjust the grading scale, if necessary, to achieve a proper distribution of performance among the class. You can find information about the UF grading policies in the Graduate Student Handbook at:

<http://www.graduateschool.ufl.edu/media/graduate-school/pdf-files/handbook.pdf>

Additional information about the University of Florida's Graduate School Grading Policies are further explained at the following link:

<https://catalog.ufl.edu/UGRD/academic-regulations/grades-grading-policies/>

Required and Recommended Textbooks, Readings, and Class Notes

- **Textbooks** – There is one **required text** associated with this course. The **required text** is:

Chapman, C. and Feit, E. (2019). *R for Marketing Research and Analytics* . Switzerland AG: Springer Nature

This book is available at the U.F. Bookstore and on Amazon.com. The approximate cost should be approximately \$57 - \$85.

During the course, we will utilize marketing analytics use case examples and datasets from the Web. Sources will vary but will be provided before class in order for students to prepare for the lectures and assignments.

Class Notes, R-code, and Data – Class notes, R-code and datasets for this course will be available in Canvas - <https://ufl.instructure.com> .

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Attendance, Make-up Exams, and Other Work

Students are responsible for satisfying all academic objectives as defined by the professor. Absences count beginning with the first class meeting and are incorporated into the participation grade. Additionally, you will be evaluated based on your contribution to your team. Attendance at team meetings is important as well. This will be assessed by each of your teammates as part of the final presentation report submission.

In general, acceptable reasons for absence from or failure to participate in class include illness, serious family emergencies, special curricular requirements (e.g., judging trips, field trips, professional conferences), military obligation, severe weather conditions, religious holidays, and participation in official university activities such as music performances, athletic competition or debate. Absences from class for court-imposed legal obligations (e.g., jury duty or subpoena) must be excused. Other reasons also may be approved.

Students shall be permitted a reasonable amount of time to make up the material or activities covered in their absence.

Students cannot participate in the class unless they are registered officially or approved to audit with evidence of having paid audit fees. The Office of the University Registrar provides official class rolls to instructors.

Students in this class must participate in at least one of the first two class meetings, or risk being dropped from the course. If you cannot attend at least one those initial classes, please contact me using the contact information at the top of the Syllabus. If you are dropped from this course, the department will notify you.

Attendance in this class is part of the overall grading criteria. Additionally, missing a class also means that the associated assignments will potentially be affected or not accepted (for those that are to be completed in class). I highly encourage attendance. Missing an excessive number of classes may result in a failing grade for the course.

Accommodations for Students with Disabilities

Students with disabilities who experience learning barriers and would like to request academic accommodations should connect with the disability Resource Center by visiting <https://disability.ufl.edu/students/get-started/> . It is important for students to share their accommodation letter with their instructor and discuss their access needs, as early as possible in the module.

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Online Course Evaluation Process

Students are expected to provide professional and respectful feedback on the quality of instruction in this course by
Original file: MAR 6XXX - Marketing Analytics 1.docx

completing course evaluations online via GatorEvals. Guidance on how to give feedback in a professional and respectful manner is available at <https://gatorevals.aa.ufl.edu/students/> . Students will be notified when the evaluation period opens, and can complete evaluations through the email they receive from GatorEvals, in their Canvas course menu under GatorEvals, or via <https://ufl.bluera.com/ufl/> . Summaries of course evaluation results are available to students at <https://gatorevals.aa.ufl.edu/public-results/> .

Honor Code Reminder

UF students are bound by The Honor Pledge which states, “We, the members of the University of Florida community, pledge to hold ourselves and our peers to the highest standards of honor and integrity by abiding by the Honor Code. On all work submitted for credit by students at the University of Florida, the following pledge is either required or implied: “On my honor, I have neither given nor received unauthorized aid in doing this assignment.” The Honor Code (<http://www.dso.ufl.edu/sccr/process/student-conduct-honorcode/>) specifies several behaviors that are in violation of this code and the possible sanctions. Furthermore, you are obligated to report any condition that facilitates academic misconduct to appropriate personnel. If you have any questions or concerns, please consult with the instructor or TAs in this class.”

Class Demeanor Expectations

You are in a graduate program and soon to enter the business workforce. In the business workforce environment, you will have to make choices based on the norms for that work environment related to the use of your cell phones and using laptops in business meetings. To practice how you will probably need to operate in that environment, I request that cell phone ringers be silenced during class and that laptop speakers be set to silent. Exercise professional decision-making about how you use your electronic devices while in class.

If you are late to class or need to leave class for appointments or emergencies, please be respectful of your fellow students and the professor. Be as quiet as possible when leaving or entering.

Assurance of Learning

The University of Florida MBA program participates in the Association to Advance Collegiate Schools of Business (AACSB) approach to Assurance of Learning (AOL) objectives. The MAR6930 course is aligned to the AOL goals and objectives below:

Goal 1: Demonstrate competency across business disciplines.

1A. Objective: Apply the essential elements of core business principles to analyze and evaluate problems and to construct and implement solutions in the business environment.

Goal 2: Demonstrate knowledge and understanding of leadership skills and styles appropriate for working with a variety of individual and groups.

2A. Objective: Apply knowledge of core leadership skills to analyze and evaluate problems, choose from and generate alternative solutions, for the purpose of affecting organizational change or influencing others.

Goal 3: Demonstrate critical thinking.

3A. Employ appropriate analytical models and apply critical reasoning processes to evaluate evidence, select among alternatives, and generate creative options in furtherance of effective decision-making.

Goal 4: Possess effective communication skills.

4A. Write business documents clearly, concisely, and analytically

4B. Speak in groups and in public clearly, concisely, and analytically, with appropriate use of visual aide.

Course|New for request 14786

Info

Request: MARKETING ANALYTICS 2 - APPROVAL

Description of request: Request approval for new graduate course and assign course number.

Submitter: Shawn Lee shawn.lee@warrington.ufl.edu

Created: 3/5/2020 10:44:45 AM

Form version: 3

Responses

Recommended Prefix MAR

Course Level 6

Course Number XXX

Category of Instruction Intermediate

Lab Code None

Course Title MARKETING ANALYTICS 2

Transcript Title MARKETING ANALYTICS 2

Degree Type Graduate

Delivery Method(s) On-Campus

Co-Listing No

Effective Term Earliest Available

Effective Year Earliest Available

Rotating Topic? No

Repeatable Credit? No

Amount of Credit 2

S/U Only? No

Contact Type Regularly Scheduled

Weekly Contact Hours 2

Course Description This course is designed to engage you in the marketing analytics activities that support marketing decision-making using machine learning.

Prerequisites It is NOT required that students take Marketing Analytics 1 prior to taking Marketing Analytics 2. The two courses cover different Marketing Analytics models and techniques. However, the requirements for success are similar to Marketing Analytics 1. These include:

A key prerequisite for this course is a basic understanding of the statistical programming language R. It is expected that students will have completed one of the following:

- The R Bootcamp course from the MS ISOM Business Analytics curriculum
- An online introductory course in R, such as those offered by Coursera, Udemy, DataCamp, or an equivalent
- Significant self-taught preparation in R utilizing an introductory text or similar web-based tutorial

A second key prerequisite is an adequate background in math and statistics appropriate for the topic. Although this course will focus on the logics and business applications of the statistical tools for marketing analytics rather than the mathematical details, students are expected to have some mathematical and statistical backgrounds to fully handle the statistical tools. Basic statistical and probability courses are essential. Basic integral calculus courses are highly recommended.

The third prerequisite is an adequate laptop capable of operating both Microsoft Excel and the statistical programming scripting language R. In addition to R, the class will utilize the Integrated Development Environment (IDE) for R – RStudio. Both R and RStudio are open source software capable of operating on Windows-based and Apple-based operating systems.

Co-requisites N/A

Rationale and Placement in Curriculum Graduate level course supporting Master of Science in Business Analytics, MBA, and specialized Master in Business programs.

Course Objectives The ultimate objective at the end of the course would be for you to be confident being part of a marketing analytics team or to interpret the results of a marketing analytics analysis and make a decision for your firm. To prepare you to act in one of these roles, you will be exposed to and participate in the key processes that are used commercially to perform and explain marketing analytic efforts. Specific objectives of the course are:

- 1) Understand the most commonly used analytics methodology process.
- 2) Describe key analytics efforts that support marketing decisions.
- 3) Develop an analytics problem statement for a marketing analytics team to follow.
- 4) Identify potential sources of data to support marketing analytics efforts.
- 5) Conduct key data preparation steps to prepare data to be used in marketing models and analytics processes.
- 6) Perform a subset of marketing analytics modeling efforts in the R statistics program and Microsoft Excel
- 7) Describe the effectiveness of the marketing analytics model outputs.
- 8) Develop briefings or data visualizations of the marketing analytics models for C-suite decision-makers that minimize analytics jargon.

Course Textbook(s) and/or Other Assigned Reading Artun, O. and Levin, D. (2015). Predictive Marketing: Easy Ways Every Marketer Can Use Customer Analytics and Big Data. Hoboken, New Jersey: John Wiley & Sons

Chapman, C. and Feit, E. (2019). R for Marketing Research and Analytics. Switzerland AG: Springer Nature

Week	Class	Date	Topics	Assignments
1	Session 1		Analytics Process	• Reading: Data, Data Types, and Descriptive Statistics – Chapter 2 & 3 in R for Marketing Research and Analytics
1	Session 2		Analytics Process	• Reading: Class Notes on Canvas • Assignment: Finding and reporting on a Marketing Analytics Technique (i)
2	Session 3		Extract, Transform, Load, APIs – Describing Data	• Reading: Chapters 2 & 3 – Predictive Marketing • Chapter 4 – R for Marketing Research and Analytics • Assignment: Extracting Data from the Web using R (i)
2	Session 4		Outlier Detection, Standardization, & Normalization	• Reading: Class Notes on Canvas • Assignment: Standardizing Data and Identifying Outliers – Canvas online Exercise and Quiz (i)
3	Session 5		Data Munging / Data Wrangling / Feature Engineering	• Reading: Class Notes on Canvas • Assignment: Adding your own features to a dataset (i)
3	Session 6		Data Exploration & Visualization	• Reading: Chapter 6 - R for Marketing Research and Analytics • Assignment: Building a data visualization to explain a comparison between groups (t)
4	Session 7		Midterm Exam	• In Class Midterm Exam
4	Session 8		Customer Profile	• Reading: Chapters 4 & 6 – Predictive Marketing • Reading: Chapter 11 - R for Marketing Research and Analytics • Assignment: Using k-means clusters to create customer personas (i)
5	Session 9		Segmentation & Segmentation Methods	• Reading: Class Notes on Canvas • Assignment: Using Decision Trees in R for Clustering (i)
5	Session 10		Predicting Customer Behavior	• Reading: Chapters 9 & 10 – Predictive Marketing • Reading: Chapter 9 - R for Marketing Research and Analytics • Assignment: Interpreting a customer prediction model (i)
6	Session 11		Recommendation Engines	• Reading: Class notes on Canvas • Assignment: Quiz on Canvas about Recommendation Engines (i)

- 6 Session 12 Reducing Churn • Reading: Chapter 13 – Predictive Marketing
- Assignment: Identifying customers likely to leave (i)
- 7 Session 13 Likelihood to buy or engage • Reading: Chapter 11 – Predictive Marketing
- Assignment: Team Final Project (t)
- Final Exam Review
- 7 Session 14 Final Exam • In class Exam (i)

Grading Scheme	Grade	Grade Point Average	Score
(in percent)			
A	4.00	94.0 or above	
A-	3.67	90.0-93.9	
B+	3.33	87.0-89.9	
B	3.00	84.0-86.9	
B-	2.67	80.0-83.9	
C+	2.33	77.0-79.9	
C	2.00	74.0-76.9	
C-	1.67	70.0-73.9	
D	1.00	60.0-69.9	
E	0.00	Less than 60.0	

Instructor(s) Jim Hoover
Attendance & Make-up Yes
Accomodations Yes
UF Grading Policies for assigning Grade Points Yes
Course Evaluation Policy Yes

MAR XXXX - Marketing Analytics 2

Professor: Dr. Jim Hoover

Office:

Stuzin 264

Telephone: 352-294-0410

Email:

jim.hoover@warrington.ufl.edu

Office Hours: TBD (Schedule an appointment by email)

Term:

TBD

Section:

TBD

Location: TBD

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Course Description

This course is designed to engage you in the analytics activities that support marketing decision-making. In the course, you will complete all of the steps in an analytics process, including:

- 1) Understanding the business functional purpose behind the marketing analytics problems to be solved
- 2) Identifying the data sources and types of data and that are available to solve specific marketing problems
- 3) Executing the key efforts to prepare marketing data for analytics processes
- 4) Deciding which kinds of analytics models work best to solve specific marketing problems
- 5) Utilizing those analytics models and data to create analytics outputs that answer the marketing decision-making needs.
- 6) Evaluating the outputs of an analytics model and deciding whether the model needs to be modified
- 7) Developing briefings for decision-makers that “make digestible” the results of a marketing analytics analysis in clear, non-jargon-based language

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Course Objectives

The ultimate objective at the end of the course would be for you to be confident being part of a marketing analytics team or to interpret the results of a marketing analytics analysis and make a decision for your firm. To prepare you to act in one of these roles, you will be exposed to and participate in the key processes that are used commercially to perform and explain marketing analytic efforts. Specific objectives of the course are:

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- 2) Describe key analytics efforts that support marketing decisions.
- 3) Develop an analytics problem statement for a marketing analytics team to follow.
- 4) Identify potential sources of data to support marketing analytics efforts.
- 5) Conduct key data preparation steps to prepare data to be used in marketing models and analytics processes.
- 6) Perform a subset of marketing analytics modeling efforts in the R statistics program and Microsoft Excel
- 7) Describe the effectiveness of the marketing analytics model outputs.
- 8) Develop briefings or data visualizations of the marketing analytics models for C-suite decision-makers that minimize analytics jargon.

Course Prerequisites

It is **NOT required** that students take Marketing Analytics 1 prior to taking Marketing Analytics 2. The two courses cover different Marketing Analytics models and techniques. However, the requirements for success are similar to Marketing Analytics 1. These include:

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A second key prerequisite is an adequate background in math and statistics appropriate for the topic. Although this course will focus on the logics and business applications of the statistical tools for marketing analytics rather than the mathematical details, students are expected to have some mathematical and statistical backgrounds to fully handle the statistical tools. Basic statistical and probability courses are essential. Basic integral calculus courses are highly recommended.

The third prerequisite is an adequate laptop capable of operating both Microsoft Excel and the statistical programming

The main prerequisite is an adequate laptop capable of operating both Microsoft Excel and the statistical programming scripting language *R*. In addition to *R*, the class will utilize the Integrated Development Environment (IDE) for *R* – RStudio. Both *R* and RStudio are open source software capable of operating on Windows-based and Apple-based operating systems.

Weekly Course Schedule of Topics and Assignments

Holidays – TBD

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1	Session 1		Analytics Process	Reading: Data, Data Types, and Descriptive Statistics – Chapter 2 & 3 in R for Marketing Research and Analytics
1	Session 2		Analytics Process	Reading: Class Notes on Canvas Assignment: Finding and reporting on a Marketing Analytics Technique (i)
2	Session 3		Extract, Transform, Load, APIs – Describing Data	Reading: Chapters 2 & 3 – Predictive Marketing Chapter 4 – R for Marketing Research and Analytics Assignment: Extracting Data from the Web (i)
2	Session 4		Outlier Detection, Standardization, & Normalization	Reading: Class Notes on Canvas Assignment: Standardizing Data and Identifying Outliers – Canvas online Exercise and C
3	Session 5		Data Munging / Data Wrangling / Feature Engineering	Reading: Class Notes on Canvas Assignment: Adding your own features to a dataset (i)
3	Session 6		Data Exploration & Visualization	Reading: Chapter 6 - R for Marketing Research and Analytics Assignment: Building a data visualization to explain a comparison between groups
4	Session 7		Midterm Exam	In class Midterm Exam
4	Session 8		Customer Profile	Reading: Chapters 4 & 6 – Predictive Marketing Reading: Chapter 11 - R for Marketing Research and Analytics Assignment: Using k-means clusters to create customer personas (i)
5	Session 9		Segmentation & Segmentation Methods	Reading: Class Notes on Canvas Assignment: Using Decision Trees in R for Clustering (i)
5	Session 10		Predicting Customer Behavior	Reading: Chapters 9 & 10 – Predictive Marketing Reading: Chapter 9 - R for Marketing Research and Analytics Assignment: Interpreting a customer profile model (i)
6	Session 11		Recommendation Engines	Reading: Class notes on Canvas Assignment: Quiz on Canvas about Recommendation Engines (i)
6	Session 12		Reducing Churn	Reading: Chapter 13 – Predictive Marketing Assignment: Identifying customers likely to churn (i)
7	Session 13		Likelihood to buy or engage	Reading: Chapter 11 – Predictive Marketing Assignment: Team Final Project (t) Final Exam Review
7	Session 14		Final Exam	In class Exam (i)

Legend: (i) = individual assignment; (t) = team assignment

Evaluation and Grading Criteria

The current grading plan is listed below. Class participation is inclusive of both attendance as well as providing meaningful discussion during class. There is a total of 450 points currently planned during the course. The breakout of the points by assignment follows:

Graded Activity	Effort	Points per Assignment
Original file: MAR 6XXX - Marketing Analytics 2.docx		

Finding and reporting on a Marketing Analytics Technique	Individual	20
Extracting Data from the Web using E	Individual	20
Standardizing Data and Identifying Outliers	Individual	15
Adding your own features to a dataset	Individual	20
Building a data visualization to explain a comparison between groups	Team	35
In Class Midterm Exam	Individual	75
Using Clusters to create Customer Personas	Individual	20
Using Decision Trees in R for Clustering	Individual	20
Interpreting a Customer Prediction Model	Individual	15
Quiz on Canvas about Recommendation Engines	Individual	20
Identifying customers likely to leave	Individual	20
Team Final Project	Team	50
Class Participation	Individual	20
Final exam	Individual	100
Total Points		450

Criteria for grading activities will be provided on Canvas along with specific directions for completing the activity.

Free Rider Assessment

Because almost 20% of the grade in this course is determined by team participation, an assessment of contributions by each member of each team will be collected as part of the Final Team Recommendation Report. Members who are assessed as not contributing equitably to the team projects will receive an individual adjustment to the team assignment grades. Team members are encouraged to confidentially identify problems within teams to me early in the team assignments. This permits there to be an opportunity to intervene with team members before the final assessment is submitted.

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Grading Scale and Grading Policies for Assigning Grade Points

The grading scale will be as follows:

Grade	Grade Point Average	Score (in percent)
A	4.00	94.0 or above
A-	3.67	90.0-93.9
B+	3.33	87.0-89.9
B	3.00	84.0-86.9
B-	2.67	80.0-83.9
C+	2.33	77.0-79.9
C	2.00	74.0-76.9
C-	1.67	70.0-73.9
D	1.00	60.0-69.9
E	0.00	Less than 60.0

I reserve the right to adjust the grading scale, if necessary, to achieve a proper distribution of performance among the class. You can find information about the UF grading policies in the Graduate Student Handbook at:

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Required and Recommended Textbooks, Readings, and Class Notes

- **Textbooks** – There are two **required texts** associated with this course. The **required texts** are:

Artun, O. and Levin, D. (2015). *Predictive Marketing: Easy Ways Every Marketer Can Use Customer Analytics and Big Data* . Hoboken, New Jersey: John Wiley & Sons

This book is available at the U.F. Bookstore and on Amazon.com. The approximate cost should be approximately \$25 - \$30.

Chapman, C. and Feit, E. (2019). *R for Marketing Research and Analytics* . Switzerland AG: Springer Nature

This book is available at the U.F. Bookstore and on Amazon.com. The approximate cost should be approximately \$57 - \$85.

Separately, I recommend an OPTIONAL book for those looking for an excellent overall reference book on the use of R.

Kabacoff, R. (2020). *R in Action: Third Edition* . Shelter Island, NY: Manning Publications, Inc.

This book is available from Amazon.com or directly from the publisher at: Manning.com. Depending on whether you buy the electronic (PDF) version or the paperback copy, the cost should be approximately \$40-60.

While this book is available at Amazon.com. The R in Action book is also available at Manning.com. The Manning.com website is a good source of books and training on Analytics methods and software.

Class Notes, R-code, and Data – Class notes, R-code and datasets for this course will be available in Canvas - <https://ufl.instructure.com> .

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Attendance, Make-up Exams, and Other Work

Students are responsible for satisfying all academic objectives as defined by the professor. Absences count beginning with the first class meeting and are incorporated into the participation grade. Additionally, you will be evaluated based on your contribution to your team. Attendance at team meetings is important as well. This will be assessed by each of your teammates as part of the final presentation report submission.

In general, acceptable reasons for absence from or failure to participate in class include illness, serious family emergencies, special curricular requirements (e.g., judging trips, field trips, professional conferences), military obligation, severe weather conditions, religious holidays, and participation in official university activities such as music performances, athletic competition or debate. Absences from class for court-imposed legal obligations (e.g., jury duty or subpoena) must be excused. Other reasons also may be approved.

Students shall be permitted a reasonable amount of time to make up the material or activities covered in their absence.

Students cannot participate in the class unless they are registered officially or approved to audit with evidence of having paid audit fees. The Office of the University Registrar provides official class rolls to instructors.

Students in this class must participate in at least one of the first two class meetings, or risk being dropped from the course. If you cannot attend at least one those initial classes, please contact me using the contact information at the top of the Syllabus. If you are dropped from this course, the department will notify you.

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Assurance of Learning

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Goal 1: Demonstrate competency across business disciplines.

1A. Objective: Apply the essential elements of core business principles to analyze and evaluate problems and to construct and implement solutions in the business environment.

Goal 2: Demonstrate how to effectively use business skills and techniques to solve business problems.

Goal 2: Demonstrate knowledge and understanding of leadership skills and styles appropriate for working with a variety of individual and groups.

2A. Objective: Apply knowledge of core leadership skills to analyze and evaluate problems, choose from and generate alternative solutions, for the purpose of affecting organizational change or influencing others.

Goal 3: Demonstrate critical thinking.

3A. Employ appropriate analytical models and apply critical reasoning processes to evaluate evidence, select among alternatives, and generate creative options in furtherance of effective decision-making.

Goal 4: Possess effective communication skills.

4A. Write business documents clearly, concisely, and analytically

4B. Speak in groups and in public clearly, concisely, and analytically, with appropriate use of visual aide.

Course|New for request 14787

Info

Request: MARKETING ANALYTICS METHODS - APPROVAL
Description of request: Approve new course and assign course number.
Submitter: Shawn Lee shawn.lee@warrington.ufl.edu
Created: 3/5/2020 10:45:10 AM
Form version: 2

Responses

Recommended Prefix MAR
Course Level 6
Course Number XXX
Category of Instruction Intermediate
Lab Code None
Course Title MARKETING ANALYTICS METHODS
Transcript Title MARKETING ANALYTICS METHODS
Degree Type Graduate

Delivery Method(s) On-Campus
Co-Listing No

Effective Term Earliest Available
Effective Year Earliest Available
Rotating Topic? No
Repeatable Credit? No

Amount of Credit 2

S/U Only? No

Contact Type Regularly Scheduled

Weekly Contact Hours 2

Course Description This course is designed to engage you in the analytics activities that support marketing decision-making using Microsoft Excel.

Prerequisites Microsoft Excel familiarization.

Co-requisites N/A

Rationale and Placement in Curriculum Elective course in Marketing Analytics for Master in Marketing and specialized Master in Business programs.

Course Objectives The ultimate objective at the end of the course would be for you to be confident being part of a marketing analytics team or to interpret the results of a marketing analytics analysis and make a decision for your firm. To prepare you to act in one of these roles, you will be exposed to and participate in the key processes that are used commercially to perform and explain marketing analytic efforts. Specific objectives of the course are:

- 1) Understand the most commonly used analytics methodology process.
- 2) Describe key analytics efforts that support marketing decisions.
- 3) Develop an analytics problem statement for a marketing analytics team to follow.
- 4) Identify potential sources of data to support marketing analytics efforts.
- 5) Conduct key data preparation steps to prepare data to be used in marketing models and analytics processes.
- 6) Perform a subset of marketing analytics modeling efforts in Microsoft Excel.
- 7) Recognize the differences between using Excel for analytics modeling and other analytics tools (e.g. R, Python, commercial statistics programs).
- 8) Describe the effectiveness of the marketing analytics model outputs.
- 9) Develop briefings or data visualizations of the marketing analytics models for C-suite decision-makers that minimize analytics jargon.

Course Textbook(s) and/or Other Assigned Reading Artun, O. and Levin, D. (2015). Predictive Marketing: Easy Ways Every Marketer Can Use Customer Analytics and Big Data. Hoboken, New Jersey: John Wiley & Sons

	1	Session 1	Analytics Process	•	
			Reading: Business Analytics (BA) at a Glance – Harvard CoursePack		
•			Reading: Data, Data Types, and Descriptive Statistics – Harvard CoursePack		
1		Session 2	Analytics Process	•	Reading: Business Intelligence (BI), Business Analytics (BA), and Data Analysis – Harvard CoursePack
•			Assignment: Finding and reporting on a Marketing Analytics Technique (i)		
2		Session 3			
			Extract, Transform, Load, APIs – Describing Data	•	Reading: Chapters 2 & 3 – Predictive Marketing
•			Assignment: Extracting Data from the Web using Excel (i)		
2		Session 4	Outlier Detection, Standardization, & Normalization		
•			Reading: Class Notes on Canvas		
•			Assignment: Standardizing Data and Identifying Outliers – Canvas online Exercise and Quiz (i)		
3		Session 5			
			Data Munging / Data Wrangling / Feature Engineering	•	Reading: Class Notes on Canvas
•			Assignment: Adding your own features to a dataset (i)		
3		Session 6			
			Data Exploration & Visualization	•	Reading: Descriptive Analytics: Data Visualization – Harvard CoursePack
•			Assignment: Building a data visualization to explain a comparison between groups (t)		
4		Session 7			
			Midterm Exam	•	In Class Midterm Exam
4		Session 8			
			Customer Profile	•	Reading: Chapters 4 & 6 – Predictive Marketing
•			Assignment: Using clusters to create customer personas (i)		
5		Session 9			
			Segmentation & Segmentation Methods	•	Reading: Class Notes on Canvas
•			Assignment: Using Decision Trees in Excel for Clustering (i)		
5		Session 10			
			Predicting Customer Behavior	•	Reading: Chapters 9 & 10 – Predictive Marketing
•			Assignment: Interpreting a customer prediction model (i)		
6		Session 11			
			Recommendation Engines	•	Reading: Class notes on Canvas
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			Reducing Churn	•	Reading: Chapter 13 – Predictive Marketing
•			Assignment: Identifying customers likely to leave (i)		
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			Likelihood to buy or engage	•	Reading: Chapter 11 – Predictive Marketing
•			Assignment: Team Final Project (t)		
•			Final Exam Review		
7		Session 14			
			Final Exam	•	In class Exam (i)

Grading Scheme	Grade	Grade Point Average	Score
	(in percent)		
A	4.00	94.0 or above	

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B-	2.67	80.0-83.9
C+	2.33	77.0-79.9
C	2.00	74.0-76.9
C-	1.67	70.0-73.9
D	1.00	60.0-69.9
E	0.00	Less than 60.0

Instructor(s) Jim Hoover

Attendance & Make-up Yes

Accomodations Yes

UF Grading Policies for assigning Grade Points Yes

Course Evaluation Policy Yes

MARXXXX - Marketing Analytics Methods

Professor: Dr. Jim Hoover

Office:

Stuzin 264

Telephone: 352-294-0410

Email:

jim.hoover@warrington.ufl.edu

Office Hours: TBD

Term:

TBD

Section:

TBD

Location: TBD

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Course Description

This course is designed to engage you in the analytics activities that support marketing decision-making. In the course, you will complete all of the steps in an analytics process, including:

- 1) Understanding the business functional purpose behind the marketing analytics problems to be solved
- 2) Identifying the data sources and types of data and that are available to solve specific marketing problems
- 3) Executing the key efforts to prepare marketing data for analytics processes
- 4) Deciding which kinds of analytics models work best to solve specific marketing problems
- 5) Utilizing those analytics models and data to create analytics outputs that answer the marketing decision-making needs.
- 6) Evaluating the outputs of an analytics model and deciding whether the model needs to be modified
- 7) Developing briefings for decision-makers that “make digestible” the results of a marketing analytics analysis in clear, non-jargon-based language

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Course Objectives

The ultimate objective at the end of the course would be for you to be confident being part of a marketing analytics team or to interpret the results of a marketing analytics analysis and make a decision for your firm. To prepare you to act in one of these roles, you will be exposed to and participate in the key processes that are used commercially to perform and explain marketing analytic efforts. Specific objectives of the course are:

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Weekly Course Schedule of Topics and Assignments

Holidays – TBD

Week	Class	Date	Topics	Assignments
1	Session 1		Analytics Process	Reading: Business Analytics (BA) at a Glance – Harvard CoursePack Reading: Data, Data Types, and Descriptive Statistics – Harvard CoursePack
1	Session 2		Analytics Process	Reading: Business Intelligence (BI), Business Analytics (BA), and Data Analysis – Harvard CoursePack Assignment: Finding and reporting on a Marketing Analytics Technique (i)
2	Session 3		Extract, Transform, Load, APIs –	Reading: Chapters 2 & 3 – Predictive Marketing

			Describing Data	Assignment: Extracting Data from the Web using Excel (i)
2	Session 4		Outlier Detection, Standardization, & Normalization	Reading: Class Notes on Canvas Assignment: Standardizing Data and Identifying Outliers – Canvas online Exercise and C
3	Session 5		Data Munging / Data Wrangling / Feature Engineering	Reading: Class Notes on Canvas Assignment: Adding your own features to a dataset (i)
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Legend: (i) = individual assignment; (t) = team assignment

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In Class Midterm Exam	Individual	75
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Using Decision Trees in Excel for Clustering	Individual	20
Interpreting a Customer Prediction Model	Individual	15
Quiz on Canvas about Recommendation Engines	Individual	20
Identifying customers likely to leave	Individual	20
Team Final Project	Team	50
Class Participation	Individual	20
Final exam	Individual	100
Total Points		450

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Winston, W. (2014). *Marketing Analytics: Data-Driven Techniques with Microsoft Excel* .
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Goal 2: Demonstrate knowledge and understanding of leadership skills and styles appropriate for working with a variety of individual and groups.

2A. Objective: Apply knowledge of core leadership skills to analyze and evaluate problems, choose from and generate alternative solutions, for the purpose of affecting organizational change or influencing others.

Goal 3: Demonstrate critical thinking.

3A. Employ appropriate analytical models and apply critical reasoning processes to evaluate evidence, select among alternatives, and generate creative options in furtherance of effective decision-making.

Goal 4: Possess effective communication skills.

4A. Write business documents clearly, concisely, and analytically

4B. Speak in groups and in public clearly, concisely, and analytically, with appropriate use of visual aide.

Course|New for request 14797

Info

Request: New course request

Description of request: This course has been well-received by students as a special topics course, and we wish to make it a regular offering.

Submitter: Richard Lutz rjlutz@ufl.edu

Created: 3/5/2020 1:34:06 PM

Form version: 1

Responses

Recommended Prefix MAR

Course Level 6

Course Number XXX

Category of Instruction Intermediate

Lab Code L

Course Title Marketing Ethics

Transcript Title Marketing Ethics

Degree Type Graduate

Delivery Method(s) On-Campus

Co-Listing No

Effective Term Earliest Available

Effective Year Earliest Available

Rotating Topic? No

Repeatable Credit? No

Amount of Credit 2

S/U Only? No

Contact Type Regularly Scheduled

Weekly Contact Hours 4

Course Description Examination of ethical issues in marketing

Prerequisites MAR 5806 or equivalent

Co-requisites None

Rationale and Placement in Curriculum This course deals with ethical practices in marketing, an increasingly important topic in the digital and global arenas. It will serve as a key elective for students in our MBA, MIB, MSM, and MS in Marketing programs.

Course Objectives In this course, we will explore and analyze ethical issues commonly faced by marketers and consumers. Many fundamental marketer decisions raise concerns about harm, deception, manipulation, fairness, sustainability, and privacy. These different issues arise to varying degrees across different marketing decisions. For example, decisions of what products to offer primarily raise concerns about safety & harm; promotion and communication decisions primarily raise concerns about deception and manipulation; and pricing decisions primarily raise concerns about fairness. Many of these issues become more acute and more complicated as marketers have greater access to large sets of data and more sophisticated knowledge about the effects of marketing actions.

We will also discuss the ethical issues that arise in consumer decisions and behavior, where issues of harm, deception, fairness, and sustainability also appear, but in somewhat different ways, and with different sets of norms or expectations. Overall, we will explore how the questions of “what to sell, and how?” and “what to consume, and how?” both have ethical implications.

The course will include a mixture of lecture, discussion, and case analysis in class, and a wide-ranging set of readings and examples addressing ethical principles in commerce and consumption. The course takeaways include a greater appreciation of the general ethical issues at play in marketing and consumption, and practical guidance on how to understand, communicate, and address ethical

dilemmas clearly and systematically when they arise.

Course Textbook(s) and/or Other Assigned Reading Approximate Reading List

Week 1

1. Smith (1776). *Wealth of Nations*, Book 1, Ch 1-2 (on division of labor and exchange) (pp. 8-17)
esp. ch 1 para 1-3,10-11; ch 2 para 1-5
2. Smith (1776). *WN*, Book 2, Ch 3 excerpt (on bettering one's condition & frugality) (esp. para 25-31)

Week 2

3. Smith (1759/1790). *Theory of Moral Sentiments*, P1,S1,Ch 1-3 (on "sympathy") (pp. 4-14)
4. Smith (1759/1790). *TMS*, P3, Ch 3-4 (on conscience) (pp. 118-143)
esp. ch 3 para 1-6, 29-31, 38-41; ch 4 para 5-11
5. Smith (1759/1790). *TMS*, P4, Ch 1 (on utility/beauty/symbolic & social value/rich & poor) (pp. 160-167)
6. Mill (1863). *Utilitarianism*, Ch 2 (what utilitarianism is)
7. *Stanford Encyclopedia of Philosophy: Deontological Ethics* (esp. pp 1-11)

Week 3

8. Greene (2016). *Solving the Trolley Problem, A Companion to Experimental Philosophy*. (1st 3 pages)
9. Greene (2016). *Our driverless dilemma*, *Science*.
10. Maxmen (2018). *Self-driving car dilemmas reveal that moral choices are not universal*. *Nature*.

11. Haidt (2012). *The Righteous Mind*, Chapter 7: *The Moral Foundations of Politics* (pp. 1-21)
12. Kennedy (1962). *Special Message to the Congress on Protecting the Consumer Interest*

Week 4

13. Roose (2019). *Juul's convenient smoke screen* (NYT 1/11/19) / newer Juul article
14. *The Economist* (1997). *Blowing smoke*, 12/18/97
15. FTC (1983). *FTC policy statement on deception*. (pp. 1-6)
16. FDA (2018). *Nutrition Facts Label Reboot: A tale of two labels*, 10/25/18.
17. Sunstein (2018). *The USDA is right: Bioengineered foods don't need labels*, *Bloomberg*, 6/18/18.

Week 5

18. Akerlof & Shiller (2015). *Phishing for Phools*, Preface & Introduction. (vii-xvi, 1-11)
19. Thaler & Sunstein (2008). *Nudge* Intro & Ch 17 (pp. 1-14, 239-254)
20. Thaler (2015). *The power of nudges, for good and bad*, NYT 10/31/15.
21. Scheiber (2017). *How Uber uses psychological tricks to push its drivers' buttons*, NYT 4/2/17.

Week 6

22. Leonhardt (2005). *Why that doggie in the window costs a lot more than you think*. NYT 5/16/05.
23. Howe (2017). *A special price, just for you*, *Forbes*, 11/17/17.
24. Frank (2017). *Tesla's tiered pricing is a hurdle, but a fair one*, NYT 10/27/17.
25. Pear (2019). *Drug makers try to justify prescription prices*, NYT 2/26/19.
26. Feifer (2016). *Why it's nearly impossible to stop this Amazon and eBay scheme*, *Entrepreneur* 7/27/16.
27. Rosenberg (2019). *Treat medicines like Netflix treats shows*, NYT 3/5/19.

Some further readings

Moral dilemmas

- *Awad et al (2018). *The Moral Machine experiment*, *Nature*.
- *Bonnefon et al. (2016). *The social dilemma of autonomous vehicles*, *Science*.
- *Singer (1972). *Famine, Affluence, and Morality*, *Philosophy and Public Affairs*.
- *Aquinas (1274), *Summa Theologica*, 2.2.Q64 ("of murder") 2.2.Q77 ("of cheating...in buying and selling")

Manipulation issues

- *Crisp (1987). *Persuasive advertising, autonomy, and the creation of desire*, *JBE*.
- *Shiller (2015). *Faith in an unregulated free market? Don't fall for it*. NYT, 10/9/15.

Privacy issues

- *Zittrain (2018). *Mark Zuckerberg can still fix this mess*, NYT 4/7/18.

*Harvard Law Today (2019). Zittrain/Zuckerberg interview, 2/20/19.

Weekly Schedule of Topics Tentative Course Schedule

Date Topics / Assignments Readings Assignments / Exercises

Week 1

(Mar 10, 12) Introduction

Adam Smith & basic logic of commerce

Smith excerpts from WN ID an ethical concern

Week 2

(Mar 17, 19) Adam Smith II: Moral Sentiments

Ethical theories Smith excerpts from TMS

Mill; SEP (Deontological ethics) Quiz 1

Week 3

(Mar 24, 26) Ethical intuitions

Consumer rights & protection Greene x 2; Maxmen; Haidt

Kennedy ID a dangerous product

Week 4

(Mar 31, Apr 4) Product issues: Dangers, Externalities

Communication issues: Deception Roose; Economist

FTC; FDA; Sunstein; ID deceptive msg

Quiz 2

Week 5

(Apr 7, 9) Manipulation issues: Nudges, Clickbait

Nudge Int & Ch 17; Scheiber; Thaler; Akerlof & Shiller ID clickbait

example

Week 6

(Apr 14, 16) Pricing issues: Fairness, Clarity Aquinas; Leonhardt; Howe; Frank

Feifer; Pear; Rosenberg ID unethical pricing; Quiz 3

Week 7

(Apr 21, 23) Catchup / Student paper discussion

Other topics / Course wrap up Final Paper;

Quiz 4

Grading Scheme Course Grading Criteria

1. Class Participation (25 points)

I want you to give thoughtful contributions and examples, and ask questions. This participation grade will be based on the quality, not the sheer quantity, of your in-class contributions. Class attendance and attention are obviously prerequisites for this component of the grade.

2. Little Exercises (20 points)

I will ask you to identify and/or very briefly discuss some examples of various topics in the class. Graded S/U (but with lateness penalty).

3. Quizzes (40 points)

We will have a few straightforward quizzes about course topics and readings. The first three quizzes are at-home via Canvas; Quiz 4 occurs in class on the last day of the module.

Quiz 1 will cover readings and topics from weeks 1 & 2.

Quiz 2 will cover readings and topics from weeks 3 & 4.

Quiz 3 will cover readings and topics from weeks 5 & 6.

Quiz 4 will cover the entire class.

4. Final paper (15 points)

For the final paper, you will submit an analysis of a marketing/consumption practice (or incident, issue, organization, etc.) that raises ethical concerns. The analysis will address the various arguments for why the practice is or is not ethically permissible, and if appropriate indicate conditions that would make the practice permissible, with appropriate justification. The project is meant to be mainly analytic, not persuasive (although if a clear position you'd like to advocate results from the analysis, that's fine). You may do this alone, or with a partner. Due on Apr 23, with potential in-class discussion in the final week (Apr 21 & 23). Get approval from me for your topic by Apr 11.

Total Points will be converted into letter grades as follows:

Points	Grade
95 and up	A
90-94	A-
85-89	B+
80-84	B
77-79	B-
74-76	C+
70-73	C
67-69	C-
64-66	D+
60-63	D
below 60	E

Instructor(s) Dr. Lyle Brenner

Attendance & Make-up Yes

Accomodations Yes

UF Grading Policies for assigning Grade Points Yes

Course Evaluation Policy Yes

MAR 6930: Marketing Ethics
University of Florida, Spring 2020, Module 4

Educational Guide: Lyle Brenner

E-mail: lyle.brenner@warrington.ufl.edu
 Office: 267E Stuzin Hall

Phone: 352-273-3272
 Office Hours: Wed 1:00-3:00, or by appointment
 Website: Access thru E-learning, start at <http://elearning.ufl.edu>

Class Meetings:
 Class 17563

Tues & Thurs, periods 3-4 (9:35-11:30)

Hough 240

Course Readings:

Reading list available below. Readings will be posted (or linked to) on Elearning page.

All complete slides will be posted on the Elearning site after each class.

Course Objectives and Themes

In this course, we will explore and analyze ethical issues commonly faced by marketers and consumers. Many fundamental marketer decisions raise concerns about harm, deception, manipulation, fairness, sustainability, and privacy. These different issues arise to varying degrees across different marketing decisions. For example, decisions of what products to offer primarily raise concerns about safety & harm; promotion and communication decisions primarily raise concerns about deception and manipulation; and pricing decisions primarily raise concerns about fairness. Many of these issues become more acute and more complicated as marketers have greater access to large sets of data and more sophisticated knowledge about the effects of marketing actions.

We will also discuss the ethical issues that arise in consumer decisions and behavior, where issues of harm, deception, fairness, and sustainability also appear, but in somewhat different ways, and with different sets of norms or expectations. Overall, we will explore how the questions of “what to sell, and how?” and “what to consume, and how?” both have ethical implications.

The course will include a mixture of lecture, discussion, and case analysis in class, and a wide-ranging set of readings and examples addressing ethical principles in commerce and consumption. The course takeaways include a greater appreciation of the general ethical issues at play in marketing and consumption, and practical guidance on how to understand, communicate, and address ethical dilemmas clearly and systematically when they arise.

Tentative Course Schedule

Date	Topics / Assignments	Readings	Assignments / Exercises
Week 1 (Mar 10, 12)	Introduction Adam Smith & basic logic of commerce	Smith excerpts from <i>WN</i>	ID an ethical concern
Week 2 (Mar 17, 19)	Adam Smith II: Moral Sentiments Ethical theories	Smith excerpts from <i>TMS</i> Mill; SEP (Deontological ethics)	Quiz 1
Week 3 (Mar 24, 26)	Ethical intuitions Consumer rights & protection	Greene x 2; Maxmen; Haidt Kennedy	ID a dangerous product
Week 4 (Mar31, Apr4)	Product issues: Dangers, Externalities Communication issues: Deception	Roose; Economist FTC; FDA; Sunstein;	ID deceptive msg Quiz 2
Week 5 (Apr 7, 9)	Manipulation issues: Nudges, Clickbait	Nudge Int & Ch 17; Scheiber; Thaler; Akerlof & Shiller	ID clickbait example
Week 6 (Apr 14 16)	Pricing issues: Fairness, Clarity	Aquinas; Leonhardt; Howe; Frank Feifer; Pear; Rosenberg	ID unethical pricing; Quiz 3

Week 7 (Apr 21, 23)	Catchup / Student paper discussion Other topics / Course wrap up		Final Paper; Quiz 4
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Course Grading Criteria

1. Class Participation (25 points)

I want you to give thoughtful contributions and examples, and ask questions. This participation grade will be based on the quality, not the sheer quantity, of your in-class contributions. Class attendance and attention are obviously prerequisites for this component of the grade.

2. Little Exercises (20 points)

I will ask you to identify and/or very briefly discuss some examples of various topics in the class. Graded S/U (but with lateness penalty).

3. Quizzes (40 points)

We will have a few straightforward quizzes about course topics and readings. The first three quizzes are at-home via Canvas; Quiz 4 occurs in class on the last day of the module.

Quiz 1 will cover readings and topics from weeks 1 & 2.

Quiz 2 will cover readings and topics from weeks 3 & 4.

Quiz 3 will cover readings and topics from weeks 5 & 6.

Quiz 4 will cover the entire class.

4. Final paper (15 points)

For the final paper, you will submit an analysis of a marketing/consumption practice (or incident, issue, organization, etc.) that raises ethical concerns. The analysis will address the various arguments for why the practice is or is not ethically permissible, and if appropriate indicate conditions that would make the practice permissible, with appropriate justification. The project is meant to be mainly analytic, not persuasive (although if a clear position you'd like to advocate results from the analysis, that's fine). You may do this alone, or with a partner. Due on Apr 23, with potential in-class discussion in the final week (Apr 21 & 23). Get approval from me for your topic by Apr 11.

Total Points will be converted into letter grades as follows:

Points	Grade
95 and up	A
90-94	A-
85-89	B+
80-84	B
77-79	B-
74-76	C+
70-73	C
67-69	C-
64-66	D+
60-63	D
below 60	E

Other Policies and Comments

Academic Integrity. UF students are bound by The Honor Pledge which states, "We, the members of the University of Florida community, pledge to hold ourselves and our peers to the highest standards of honor and integrity by abiding by the Honor Code. On all work submitted for credit by students at the University of Florida, the following pledge is either required or implied: "On my honor, I have neither given nor received unauthorized aid in doing this assignment."

The Honor Code (<http://www.dso.ufl.edu/sccr/process/student-conduct-honorcode/>) specifies a number of behaviors that are in violation of this code and the possible sanctions. Furthermore, you are obligated to report any condition that facilitates academic misconduct to appropriate personnel.

Attendance. Requirements for class attendance and make-up exams, assignments, and other work in this course are consistent with university policies that can be found at: <https://catalog.ufl.edu/ugrad/current/regulations/info/attendance.aspx>

Information on current UF grading policies for assigning grade points.

<https://catalog.ufl.edu/UGRD/academic-regulations/grades-grading-policies/>

Campus Resources. U Matter, We Care: If you or others are in distress, please contact umatter@ufl.edu or 352 392- 1575. You can also contact the Counseling and Wellness Center: <https://counseling.ufl.edu/>, 352-392-1575; and the University Police Department: 352-392-1111 or 9-1-1 for emergencies.

Academic Resources. E-learning technical support, 352-392-4357 (select option 2) or e-mail Learningsupport@ufl.edu.
<https://lss.at.ufl.edu/help.shtml>

Disabilities. Students with disabilities requesting accommodations should first register with the Disability Resource Center (352-392-8565, www.dso.ufl.edu/drc/) by providing appropriate documentation. Once registered, students will receive an accommodation letter which must be presented to the instructor when requesting accommodation. Students with disabilities should follow this procedure as early as possible in semester.

Course Evaluation. Students are expected to provide professional and respectful feedback on the quality of instruction in this course by completing course evaluations online via GatorEvals. Guidance on how to give feedback in a professional and respectful manner is available at <https://gatorevals.aa.ufl.edu/students/>. Students will be notified when the evaluation period opens, and can complete evaluations through the email they receive from GatorEvals, in their Canvas course menu under GatorEvals, or via <https://ufl.bluera.com/ufl/>. Summaries of course evaluation results are available to students at <https://gatorevals.aa.ufl.edu/public-results/>

Lateness, phones, computers, and general etiquette. Being late to class or letting your phone ring during class are disruptions that are a nuisance to everyone, but are easily avoided. Please be on time, and during class, please suspend use of any device (e.g., phones and computers) that may be disruptive or distracting to the class (including yourself and the instructor).

Approximate Reading List

Week 1

1. Smith (1776). [*Wealth of Nations*](#), Book 1, Ch 1-2 (on division of labor and exchange) (pp. 8-17) esp. ch 1 para 1-3,10-11; ch 2 para 1-5
2. Smith (1776). *WN*, Book 2, Ch 3 excerpt (on bettering one's condition & frugality) (esp. para 25-31)

Week 2

3. Smith (1759/1790). [*Theory of Moral Sentiments*](#), P1,S1,Ch 1-3 (on "sympathy") (pp. 4-14)
4. Smith (1759/1790). *TMS*, P3, Ch 3-4 (on conscience) (pp. 118-143) esp. ch 3 para 1-6, 29-31, 38-41; ch 4 para 5-11
5. Smith (1759/1790). *TMS*, P4, Ch 1 (on utility/beauty/symbolic & social value/rich & poor) (pp. 160-167)
6. Mill (1863). [*Utilitarianism*](#), Ch 2 (what utilitarianism is)
7. Stanford Encyclopedia of Philosophy: [*Deontological Ethics*](#) (esp. pp 1-11)

Week 3

8. Greene (2016). [*Solving the Trolley Problem*](#), *A Companion to Experimental Philosophy*. (1st 3 pages)
9. Greene (2016). [*Our driverless dilemma*](#), *Science*.
10. Maxmen (2018). *Nature*.
11. Haidt (2012). [*The Righteous Mind, Chapter 7: The Moral Foundations of Politics*](#) (pp. 1-21)
12. Kennedy (1962). [*Special Message to the Congress on Protecting the Consumer Interest*](#)

Week 4

13. Roose (2019). [*Juul's convenient smoke screen \(NYT 1/11/19\)*](#) / newer Juul article
14. The Economist (1997). [*Blowing smoke*](#), 12/18/97
15. FTC (1983). [*FTC policy statement on deception*](#). (pp. 1-6)
16. FDA (2018). [*Nutrition Facts Label Reboot: A tale of two labels*](#), 10/25/18.
17. Sunstein (2018). [*The USDA is right: Bioengineered foods don't need labels*](#), Bloomberg, 6/18/18.

Week 5

18. Akerlof & Shiller (2015). *Phishing for Phools*, Preface & Introduction. (vii-xvi, 1-11)
19. Thaler & Sunstein (2008). *Nudge* Intro & Ch 17 (pp. 1-14, 239-254)
20. Thaler (2015). [*The power of nudges, for good and bad*](#), *NYT* 10/31/15.
21. Scheiber (2017). [*How Uber uses psychological tricks to push its drivers' buttons*](#), *NYT* 4/2/17.

Week 6

22. Leonhardt (2005). [*Why that doggie in the window costs a lot more than you think.*](#) *NYT* 5/16/05.
23. Howe (2017). [*A special price, just for you*](#), *Forbes*, 11/17/17.
24. Frank (2017). [*Tesla's tiered pricing is a hurdle, but a fair one*](#), *NYT* 10/27/17.
25. Pear (2019). [*Drug makers try to justify prescription prices*](#), *NYT* 2/26/19.
26. Feifer (2016). [*Why it's nearly impossible to stop this Amazon and eBay scheme.*](#) *Entrepreneur* 7/27/16.
27. Rosenberg (2019). [*Treat medicines like Netflix treats shows*](#), *NYT* 3/5/19.

Some further readings

Moral dilemmas

- *Awad et al (2018). [*The Moral Machine experiment*](#), *Nature*.
- *Bonnenfon et al. (2016). [*The social dilemma of autonomous vehicles*](#), *Science*.
- *Singer (1972). [*Famine, Affluence, and Morality*](#), *Philosophy and Public Affairs*.
- *Aquinas (1274), [*Summa Theologica*](#), 2.2.Q64 ("of murder") 2.2.Q77 ("of cheating...in buying and selling")

Manipulation issues

- *Crisp (1987). [*Persuasive advertising, autonomy, and the creation of desire*](#), *JBE*.
- *Shiller (2015). [*Faith in an unregulated free market? Don't fall for it*](#). *NYT*, 10/9/15.

Privacy issues

- *Zittrain (2018). [*Mark Zuckerberg can still fix this mess*](#), *NYT* 4/7/18.

Harvard Law Today (2019). [Litram/Zuckerberg interview](#), 2/20/19.

Course|New for request 14805

Info

Request: New Course - Analytics Processes for Business Syllabus

Description of request: This course is for the New Business Analytic Track in ISOM. This course is designed to prepare students to utilize the Statistical Programming language R to perform analytics processes for business.

Submitter: Elizabeth Thomas elizabeth.thomas@warrington.ufl.edu

Created: 3/10/2020 4:29:44 PM

Form version: 1

Responses

Recommended Prefix QMB

Course Level 6

Course Number XXX

Category of Instruction Intermediate

Lab Code None

Course Title Analytics Processes for Business – Bootcamp

Transcript Title Analytics Bootcamp

Degree Type Graduate

Delivery Method(s) On-Campus

Co-Listing No

Effective Term Earliest Available

Effective Year Earliest Available

Rotating Topic? No

Repeatable Credit? No

Amount of Credit 1

S/U Only? No

Contact Type Regularly Scheduled

Weekly Contact Hours 1

Course Description The ultimate objective of the course is to prepare you to use one of the most comprehensive business analytics tools effectively within a standard analytics process framework. This tool and framework can be applied to almost all business analytics and modeling efforts, including Artificial Intelligence.

Prerequisites None

Co-requisites None

Rationale and Placement in Curriculum This course is an introductory course for the Business Analytics track. It is the first in a series of analytics courses intended to prepare students to work on practicum projects with companies.

Course Objectives This course is an introductory course for the Business Analytics track. It is the first in a series of analytics courses intended to prepare students to work on practicum projects with companies.

Course Textbook(s) and/or Other Assigned Reading Irizarry, R. (2020). Introduction to Data Science: Data Analysis and Prediction Algorithms with R. Boca Raton, Florida: Taylor and Francis Group.

Carroll, J. (2019). Beyond Spreadsheets with R: A beginners guide to R and RStudio. Shelter Island, NY: Manning Publications Co.

Weekly Schedule of Topics Week

Class Date Topics

Assignments

1 Session 1 TBD

Analytics Process Models for Business – CRISP-DM; Installing R & RStudio on your laptop, Exploring the RStudio IDE, First code in R

- Reading: Beyond Spreadsheets with R – Appendix A & B
- Assignment: Using R & RStudio on your laptop (i)

1 Session 2 TBD

Understanding and manipulating data types in R

- Reading: Beyond Spreadsheets with R – Chapter 2
- Assignment: Data Wrangling & Data Munging (i)

2 Session 3 TBD

Comprehending the object-oriented nature of R

- Reading: Class Notes on Canvas
- Reading: Beyond Spreadsheets with R – Chapter 3
- Assignment: Manipulating objects (i)

2 Session 4 TBD Retrieving data from multiple sources for use in Business Analytics

- Reading: Introduction to Data Science - Chapter 5
- Assignment: Retrieving a dataset from Github with R

3 Session 5 TBD Loading and using packages (libraries) in R

- Reading: Beyond Spreadsheets with R – Chapter 1, Chapter 4, Section 4.2
- Assignment: Exploring data embedded in CRAN packages (i)

3 Session 6 TBD Exploring and Using Standard Analytics Processes

- Reading: Class Notes on Canvas
- Assignment: Identifying the key steps of an analytics process (i)

4 Session 7 TBD Midterm Exam

- In Class Midterm Exam

4 Session 8 TBD Manipulating data in vectors, lists, and data frames

- Reading: Beyond Spreadsheets with R - Chapter 6
- Reading: : Introduction to Data Science – Chapters 20 and 21
- Assignment: Using dplyr and the tidyverse to manipulate data (i)

5 Session 9 TBD Utilizing SQL

- Reading: Beyond Spreadsheets with R – Chapter 7
- Reading: Introduction to Data Science – Chapters 22
- Assignment: Performing Table Joins and manipulations in R (i)

5 Session 10 TBD Building Functions in R

- Reading: Beyond Spreadsheets with R – Chapter 4
- Assignment: Creating your own function in R (i)

6 Session 11 TBD Using Conditional Control Structures

- Reading: Introduction to Data Science – Chapter 3
- Reading: Beyond Spreadsheets with R – Chapter 8

- Assignment: Creating a conditional control structure (i)
- 6 Session 12 TBD Completing data visualization activities using Base R and ggplot2
- Reading: Introduction to Data Science – Chapters 6-10
 - Reading: Beyond Spreadsheets with R – Chapter 9 & Appendix C
 - Assignment: Histograms and Box Plots (i)
- 7 Session 13 TBD Creating your first simple models in R
- Reading: Introduction to Data Science – Chapter 17
 - Assignment: Interpreting OLS Regression in R (i)
- 7 Session 14 TBD Putting it all together in Real World Assignments
- Assignment: Team Project (t)
 - Final Exam Review
- 7 Session 15 TBD Final Exam
- In class Exam (i)

Grading Scheme Evaluation and Grading Criteria

The current grading plan is listed below. Class participation is inclusive of both attendance as well as providing meaningful discussion during class. There is a total of 425 points currently planned during the course. The breakout of the points by assignment follows:

Graded Activity

Effort

Points per Assignment

Using R & RStudio on your laptop

Individual

15

Exploring data embedded in CRAN packages

Individual

15

Data Wrangling & Data Munging

Individual

20

Manipulating objects

Individual

15

Retrieving a dataset from Github with R

Individual

15

Identifying the key steps of an analytics process

Individual

15
In Class Midterm Exam

Individual

70
Using dplyr and the tidyverse to manipulate data

Individual

20
Performing Table Joins and manipulations in R

Individual

20
Creating your own function in R

Individual

20
Creating a conditional control structure

Individual

15
Histograms and Box Plots

Individual

15
Interpreting OLS Regression in R

Individual

20
Team Project

Team

50
In class Exam

Individual

100
Total Points

425

Instructor(s) Jim Hoover
Attendance & Make-up Yes
Accomodations Yes
UF Grading Policies for assigning Grade Points Yes
Course Evaluation Policy Yes

QMBXXXX – Analytics Processes for Business – Bootcamp

Professor: Dr. Jim Hoover

Office:

Stuzin 264

Telephone: 352-294-0410

Email:

jim.hoover@warrington.ufl.edu

Office Hours: Tuesday, Thursday 08:30 to 09:20 a.m. (Schedule an appointment by email)

Term:

TBD

Section:

TBD

Location: TBD

-

Course Description

This course is designed to prepare you to utilize the Statistical Programming (or scripting) language **R** to perform analytics processes for business. In this course you will complete a number of activities that will prepare you to perform business analytics analysis and modeling techniques across all of the functional domains of business. These activities include:

- 1) Installing **R** and RStudio on your laptop
- 2) Loading and using packages (libraries) with **R**
- 3) Describing the importance of a standard analytics process for business (CRISP-DM)
- 4) Understanding and manipulating data types in **R** (Data Munging and Data Wrangling)
- 5) Comprehending the object-oriented nature of **R**
- 6) Retrieving data from multiple sources for use in Business Analytics
- 7) Manipulating data in vectors, lists, and data frames
- 8) Utilizing SQL
- 9) Building functions in **R**
- 10) Using conditional control structures
- 11) Completing data visualization activities using Base **R** and ggplot2
- 12) Creating your first simple models in **R**

In “real world” business analytics projects, you will need to execute key analytics actions in **R**. In this course, you will complete several small individual exercises to measure your comprehension of the concepts and your ability to apply what you have learned.

Course Objectives

The ultimate objective of the course is to prepare you to use one of the most comprehensive business analytics tools effectively within a standard analytics process framework. This tool and framework can be applied to almost all business analytics and modeling efforts, including Artificial Intelligence.

Specific objectives of the course are:

- 1) Develop an understanding of R and RStudio for use in developing more complex business analytics models in Business Analytics courses.
- 2) Apply a standard approach to solving a business analytics problem that can be used regardless of the specific application.

Weekly Course Schedule of Topics and Assignments

Holidays –

Week	Class	Date	Topics	Assignments
1	Session 1	TBD	Analytics Process Models for Business – CRISP-DM ; Installing R & RStudio on your laptop, Exploring the RStudio IDE, First code in R	Reading: Beyond Spreadsheets with R – Appendix A & B Assignment: Using R & RStudio on your laptop
1	Session 2	TBD	Understanding and manipulating data types in R	Reading: Beyond Spreadsheets with R – 2 Assignment: Data Wrangling & Data Munging

2	Session 3	TBD	Comprehending the object-oriented nature of <i>R</i>	Reading: Class Notes on Canvas Reading: <i>Beyond Spreadsheets with R</i> - 3 Assignment: Manipulating objects (i)
2	Session 4	TBD	Retrieving data from multiple sources for use in Business Analytics	Reading: <i>Introduction to Data Science</i> - 5 Assignment: Retrieving a dataset from Github with <i>R</i>
3	Session 5	TBD	Loading and using packages (libraries) in <i>R</i>	Reading: <i>Beyond Spreadsheets with R</i> - 1, Chapter 4, Section 4.2 Assignment: Exploring data embedded in packages (i)
3	Session 6	TBD	Exploring and Using Standard Analytics Processes	Reading: Class Notes on Canvas Assignment: Identifying the key steps of an analytics process (i)
4	Session 7	TBD	Midterm Exam	In Class Midterm Exam
4	Session 8	TBD	Manipulating data in vectors, lists, and data frames	Reading: <i>Beyond Spreadsheets with R</i> - 6 Reading: <i>Introduction to Data Science</i> Chapters 20 and 21 Assignment: Using dplyr and the tidyverse to manipulate data (i)
5	Session 9	TBD	Utilizing SQL	Reading: <i>Beyond Spreadsheets with R</i> - 7 Reading: <i>Introduction to Data Science</i> - Chapters 22 Assignment: Performing Table Joins and manipulations in <i>R</i> (i)
5	Session 10	TBD	Building Functions in <i>R</i>	Reading: <i>Beyond Spreadsheets with R</i> - 4 Assignment: Creating your own function
6	Session 11	TBD	Using Conditional Control Structures	Reading: <i>Introduction to Data Science</i> - 3 Reading: <i>Beyond Spreadsheets with R</i> - 8 Assignment: Creating a conditional control structure (i)
6	Session 12	TBD	Completing data visualization activities using Base <i>R</i> and ggplot2	Reading: <i>Introduction to Data Science</i> - 6-10 Reading: <i>Beyond Spreadsheets with R</i> - 9 & Appendix C Assignment: Histograms and Box Plots (i)
7	Session 13	TBD	Creating your first simple models in <i>R</i>	Reading: <i>Introduction to Data Science</i> - 17 Assignment: Interpreting OLS Regression
7	Session 14	TBD	Putting it all together in Real World Assignments	Assignment: Team Project (t) Final Exam Review
7	Session 15	TBD	Final Exam	In class Exam (i)

Legend: (i) = individual assignment; (t) = team assignment

Evaluation and Grading Criteria

The current grading plan is listed below. Class participation is inclusive of both attendance as well as providing meaningful discussion during class. There is a total of 425 points currently planned during the course. The breakout of the points by assignment follows:

Graded Activity	Effort	Points per Assignment
Using R & RStudio on your laptop	Individual	15
Exploring data embedded in CRAN packages	Individual	15
Data Wrangling & Data Munging	Individual	20
Manipulating objects	Individual	15
Retrieving a dataset from Github with <i>R</i>	Individual	15
Identifying the key steps of an analytics process	Individual	15
In Class Midterm Exam	Individual	70

Using dplyr and the tidyverse to manipulate data	Individual	20
Performing Table Joins and manipulations in R	Individual	20
Creating your own function in R	Individual	20
Creating a conditional control structure	Individual	15
Histograms and Box Plots	Individual	15
Interpreting OLS Regression in R	Individual	20
Team Project	Team	50
In class Exam	Individual	100
Total Points		425

Criteria for grading activities will be provided on Canvas along with specific directions for completing the activity.

Free Rider Assessment

Because almost 12% of the grade in this course is determined by team participation, an assessment of contributions by each member of each team will be requested as part of the Final Team Project. Members who are assessed as not contributing equitably to the team projects will receive an individual adjustment to the team assignment grades. Team members are encouraged to confidentially identify problems within teams to me early in the team assignments. This permits there to be an opportunity to intervene with team members before the final assessment is submitted.

Late or Missed Assignments

Late or missed assignments may not receive full point credit or may be assigned 0 points. Contact me if you know in advance that you will be late with an assignment or will miss an assignment (typically due to an excused absence). Acceptable notification and my concurrence with the reasons for the late or missing assignment will receive more favorable treatment than notification after an assignment is due.

If you have technical issues that prevent you from submitting assignments on schedule, please ensure that you contact the TAC Student Information Technology Support Center to document your problem and help resolve the issue. Information on how to contact Student Support can be found at:

<https://warrington.ufl.edu/information-technology-support-programs/technical-services/tac-student-support/>

Grading Scale and Grading Policies for Assigning Grade Points

The grading scale will be as follows:

Grade	Grade Point Average	Score (in percent)
A	4.00	94.0 or above
A-	3.67	90.0-93.9
B+	3.33	87.0-89.9
B	3.00	84.0-86.9
B-	2.67	80.0-83.9
C+	2.33	77.0-79.9
C	2.00	74.0-76.9
C-	1.67	70.0-73.9
D	1.00	60.0-69.9
E	0.00	Less than 60.0

I reserve the right to adjust the grading scale, if necessary, to achieve a proper distribution of performance among the class. You can find information about the UF grading policies in the Graduate Student Handbook at:

<http://www.graduateschool.ufl.edu/media/graduate-school/pdf-files/handbook.pdf> .

Additional information about the University of Florida’s Graduate School Grading Policies are further explained at the following link:

<https://catalog.ufl.edu/UGRD/academic-regulations/grades-grading-policies/> .

Textbooks – There are two **required texts** associated with this course. The **required texts** are:

Irizarry, R. (2020). *Introduction to Data Science: Data Analysis and Prediction Algorithms with R* . Boca Raton, Florida: Taylor and Francis Group.

This book is available at the U.F. Bookstore and on Amazon.com. The approximate cost should be \$89.

A **free online version** of this book is available at: <https://rafalab.github.io/dsbook/> . A free PDF version of this book is available online at: <https://leanpub.com/datasciencebook>

Carroll, J. (2019). *Beyond Spreadsheets with R: A beginners guide to R and RStudio* . Shelter Island, NY: Manning Publications Co.

This book is available at the U.F. Bookstore and on Amazon.com. The approximate cost should be between \$38 - \$50.

PDF and Kindle versions of this book is available from [Manning.com](https://www.manning.com/books/beyond-spreadsheets-with-r) for \$40.00. The link is: <https://www.manning.com/books/beyond-spreadsheets-with-r> .

Separately, I recommend a few **OPTIONAL** books for those looking for excellent overall reference books on the effective use of R.

Kabacoff, R. (2020). *R in Action: Third Edition* . Shelter Island, NY: Manning Publications, Inc.

This book is available from Amazon.com or directly from the publisher at: Manning.com. Depending on whether you buy the electronic (PDF) version or the paperback copy, the cost should be approximately \$40-60.

While this book is available at Amazon.com. The R in Action book is also available at [Manning.com](https://www.manning.com) . The Manning.com website is a good source of books and training on Analytics methods and software.

Wickham, H. & Golemund, G. (2017). *R for Data Science: Import, Tidy, Transform, Visualize, and Model Data* . Sebastopol, CA.

This book is available at the Amazon.com. The approximate cost should be \$34.

A **free** online version of this book is available at: <https://r4ds.had.co.nz> . The source code for the book is available at: <https://github.com/hadley/r4ds> .

Class Notes, R-code, and Data – Class notes, R-code and datasets for this course will be available in Canvas - <https://ufl.instructure.com> .

Attendance, Make-up Exams, and Other Work

Students are responsible for satisfying all academic objectives as defined by the professor. Absences count beginning with the first class meeting and are incorporated into the participation grade. Additionally, you will be evaluated based on your contribution to your team. Attendance at team meetings is important as well. This will be assessed by each of your teammates as part of the final presentation report submission.

In general, acceptable reasons for absence from or failure to participate in class include illness, serious family emergencies, special curricular requirements (e.g., judging trips, field trips, professional conferences), military obligation, severe weather conditions, religious holidays, and participation in official university activities such as music performances, athletic competition or debate. Absences from class for court-imposed legal obligations (e.g., jury duty or subpoena) must be excused. Other reasons also may be approved.

Students shall be permitted a reasonable amount of time to make up the material or activities covered in their absence.

Students cannot participate in the class unless they are registered officially or approved to audit with evidence of having paid audit fees. The Office of the University Registrar provides official class rolls to instructors.

Students in this class must participate in at least one of the first two class meetings, or risk being dropped from the course. If you cannot attend at least one those initial classes, please contact me using the contact information at the top of the Syllabus. If you are dropped from this course, the department will notify you.

Attendance in this class is part of the overall grading criteria. Additionally, missing a class also means that the associated assignments will potentially be affected or not accepted (for those that are to be completed in class). I highly encourage attendance. Missing an excessive number of classes may result in a failing grade for the course.

Accommodations for Students with Disabilities

Students with disabilities who experience learning barriers and would like to request academic accommodations should connect with the disability Resource Center by visiting <https://disability.ufl.edu/students/get-started/> . It is important for students to share their accommodation letter with their instructor and discuss their access needs, as early as possible in the module.

Online Course Evaluation Process

Students are expected to provide professional and respectful feedback on the quality of instruction in this course by completing course evaluations online via GatorEvals. Guidance on how to give feedback in a professional and respectful manner is available at <https://gatorevals.a.a.ufl.edu/students/> . Students will be notified when the evaluation period opens, and can complete evaluations through the email they receive from GatorEvals, in their Canvas course menu under GatorEvals, or via <https://ufl.bluera.com/ufl/> . Summaries of course evaluation results are available to students at <https://gatorevals.a.a.ufl.edu/public-results/> .

Honor Code Reminder

UF students are bound by The Honor Pledge which states, “We, the members of the University of Florida community, pledge to hold ourselves and our peers to the highest standards of honor and integrity by abiding by the Honor Code. On all work submitted for credit by students at the University of Florida, the following pledge is either required or implied: “On my honor, I have neither given nor received unauthorized aid in doing this assignment.” The Honor Code (<http://www.dso.ufl.edu/sccr/process/student-conduct-honorcode/>) specifies several behaviors that are in violation of this code and the possible sanctions. Furthermore, you are obligated to report any condition that facilitates academic misconduct to appropriate personnel. If you have any questions or concerns, please consult with the instructor or TAs in this class.”

Class Demeanor Expectations

You are in a graduate program and soon to enter the business workforce. In the business workforce environment, you will have to make choices based on the norms for that work environment related to the use of your cell phones and using laptops in business meetings. To practice how you will probably need to operate in that environment, I request that cell phone ringers be silenced during class and that laptop speakers be set to silent. Exercise professional decision-making about how you use your electronic devices while in class.

If you are late to class or need to leave class for appointments or emergencies, please be respectful of your fellow students and the professor. Be as quiet as possible when leaving or entering.

Assurance of Learning

The University of Florida MBA program participates in the Association to Advance Collegiate Schools of Business (AACSB) approach to Assurance of Learning (AOL) objectives. The QMB6XXX course is aligned to the AOL goals and objectives below:

Goal 1: Demonstrate competency across business disciplines.

1A. Objective: Apply the essential elements of core business principles to analyze and evaluate problems and to construct and implement solutions in the business environment.

Goal 2: Demonstrate knowledge and understanding of leadership skills and styles appropriate for working with a variety of individual and groups.

Original file: QMBXXX_Analytics Processes for Business Syllabus.docx

2A. Objective: Apply knowledge of core leadership skills to analyze and evaluate problems, choose from and generate alternative solutions, for the purpose of affecting organizational change or influencing others.

Goal 3: Demonstrate critical thinking.

3A. Employ appropriate analytical models and apply critical reasoning processes to evaluate evidence, select among alternatives, and generate creative options in furtherance of effective decision-making.

Goal 4: Possess effective communication skills.

4A. Write business documents clearly, concisely, and analytically

4B. Speak in groups and in public clearly, concisely, and analytically, with appropriate use of visual aide.

Course|New for request 14806

Info

Request: New Course - Analytics Practicum 1

Description of request: This course is for the New BA Track in ISOM. The course is designed to engage students in solving “real world” business analytics problems.

Submitter: Elizabeth Thomas elizabeth.thomas@warrington.ufl.edu

Created: 3/11/2020 3:39:37 PM

Form version: 2

Responses

Recommended Prefix QMB

Course Level 6

Course Number XXX

Category of Instruction Intermediate

Lab Code None

Course Title Analytics Projects Practicum 1

Transcript Title Analytics Projects Practicum 1

Degree Type Graduate

Delivery Method(s) On-Campus

Co-Listing No

Effective Term Earliest Available

Effective Year Earliest Available

Rotating Topic? No

Repeatable Credit? No

Amount of Credit 1

S/U Only? No

Contact Type Regularly Scheduled

Weekly Contact Hours 1

Course Description This course is designed to engage you in solving “real world” business analytics problems. You will be a part of a small team of students that work with a business or organization. In this first practicum module, the focus will be on the first key steps of the analytics process.

Prerequisites Analytics Processes for Business- Bootcamp

Co-requisites None

Rationale and Placement in Curriculum This course is for the Business Analytics track. It is the second in a series of analytics courses intended to prepare students to work on practicum projects with companies.

Course Objectives The ultimate objective of the practicum is to prepare you to be a key part of a business analytics team and perform the actions of a standard analytics process. This first course encompasses the Business Understanding, Data Understanding, and Data Preparation steps of the business analytics process.

Course Textbook(s) and/or Other Assigned Reading Irizarry, R. (2020). Introduction to Data Science: Data Analysis and Prediction Algorithms with R. Boca Raton, Florida: Taylor and Francis Group.

Carroll, J. (2019). Beyond Spreadsheets with R: A beginners guide to R and RStudio. Shelter Island, NY: Manning Publications Co.

Weekly Schedule of Topics 1 Session 1 TBD Analytics Process Models for Business – CRISP-DM • Reading: CRISP-DM 1.0 – Available on Canvas

• Assignment: Determine the Business Objective (t)

1 Session 2 TBD Determining the Success Criteria for a business analytics project

• Reading: Class Notes on Canvas

• Assignment: First meeting with project partner (t)

- 2 Session 3 TBD Data anonymization, data transfer, and data storage
 - Reading: Class Notes on Canvas
 - Assignment: Retrieve initial data (t)
- 2 Session 4 TBD Initial data analysis • Reading: Class Notes on Canvas
 - Assignment: Data Dictionary (t)
- 3 Session 5 TBD Initial data analysis • Reading: Class Notes on Canvas
 - Assignment: Assessing the need for data manipulation (t)
- 3 Session 6 TBD Exploratory data analysis • Reading: Class Notes on Canvas
 - Assignment: Submit the initial Data Description report (t)
- 4 Session 7 TBD Midterm Exam • In Class Midterm Exam (i)
- 4 Session 8 TBD Assessing the proposed modeling approach that meets the business analytics project objective • Reading: Class Notes on Canvas
 - Assignment: Describe applicable modeling approaches (t)
- 5 Session 9 TBD Comparing initial data received with modeling approach
 - Reading: Class Notes on Canvas
 - Assignment: Assessment about adequacy of initial data (t)
- 5 Session 10 TBD Developing a data wrangling / data munging approach
 - Reading: Class Notes on Canvas
 - Assignment: Assessing variable adequacy for modeling approach (t)
- 6 Session 11 TBD Conducting data preparation for modeling •
 - Reading: Class Notes on Canvas
 - Assignment: Techniques for data munging (t)
- 6 Session 12 TBD Completing data preparation and documenting the final modeling dataset/s • Reading: Class Notes on Canvas
 - Assignment: Report on data wrangling and transformations (t)
- 7 Session 13 TBD Finishing the Data Description Report • Reading: Class Notes on Canvas
 - Assignment: Submit the final Data Description Report (t)
- 7 Session 14 TBD Briefing the partner organization on progress •
 - Assignment: Team Presentation (t)
 - Final Exam Review
- 8 Session 15 TBD Final Exam • In class Final Exam (i)

Grading Scheme The current grading plan is listed below. Class participation is inclusive of both attendance as well as providing meaningful discussion during class. There is a total of 450 points currently planned during the course. The breakout of the points by assignment follows:

Determine the Business Objective	Team	20
First meeting with project partner	Team	20
Retrieve initial data	Team	20
Data Dictionary	Team	20
Assessing the need for data manipulation	Team	20
Submit the Data Description report	Team	20
In Class Midterm Exam	Individual	70
Describe applicable modeling approaches	Team	20
Assessment about adequacy of initial data	Team	20
Assessing variable adequacy for modeling approach	Team	20
Techniques for data munging	Team	15
Report on data wrangling and transformations	Team	15
Submit the final Data Description Report	Team	20
Team Presentation	Team	50
In class Final Exam	Individual	100

Instructor(s) Jim Hoover

Attendance & Make-up Yes

Accomodations Yes

UF Grading Policies for assigning Grade Points Yes

Course Evaluation Policy Yes

QMBXXXX – Analytics Practicum 1

Professor: Dr. Jim Hoover

Office:

Stuzin 264

Telephone: 352-294-0410

Email:

jim.hoover@warrington.ufl.edu

Office Hours: Tuesday, Thursday 08:30 to 09:20 a.m. (Schedule an appointment by email)

Term:

TBD

Section:

TBD

Location: TBD

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Course Prerequisites

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This course is an integrated portion of the practicum related to the MS-ISOM track - Business Analytics. The prerequisite course is QMBXXXX – Analytics Processes for Business – Bootcamp.

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Course Description

This course is designed to engage you in solving “real world” business analytics problems. You will be a part of a small (4 to 5 member) team of students that work with a business or organization to analytically solve a problem. Businesses and organizations who partner with the University will provide the business problems to be solved and the datasets that students will use to develop business analytics models and visualizations. These business and organizational partners will also continue involvement with the business analytics team throughout the practicum to ensure that questions are answered, additional data is provided when required, and the team’s recommendations are relevant to the partner organization.

In this first practicum module, the focus will be on the first key steps of the analytics process. Student teams will work with the business or organization to:

- Develop the business problem statement working with the partner organization
- Gain agreement on the initial business outcome expectation working with the partner organization (i.e. what does a successful project outcome “look like”)
- Receive the initial business data
- Understand the business data
- Develop a data model and data dictionary for the business data (a.k.a. Data Description report)
- Analyze the business data (i.e. perform exploratory data analysis – EDA)
- Determine if additional data will need to be collected in order to solve the business problem
- Propose a modeling approach that addresses the business problem and is aligned with the expected project outcome
- Develop a data wrangling / data munging plan aligned with the modeling approach
- Complete initial data cleaning and preparation to develop the datasets necessary for modeling

In the next practicum course, you will utilize the data created in this class to perform the modeling and modeling assessment steps.

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Course Objectives

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The ultimate objective of the practicum is to prepare you to be a key part of a business analytics team and perform the actions of a standard analytics process. This first course encompasses the Business Understanding, Data Understanding, and Data Preparation steps of the business analytics process.

Weekly Course Schedule of Topics and Assignments

Holidays –

Week	Class	Date	Topics	Assignments
1	Session 1	TBD	Analytics Process Models for Business – CRISP-DM	Reading: CRISP-DM 1.0 – Available on Canvas Assignment: Determine the Business Objectives
1	Session 2	TBD	Determining the Success Criteria for a business analytics project	Reading: Class Notes on Canvas Assignment: First meeting with project partner

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2	Session 3	TBD	Data anonymization, data transfer, and data storage	Reading: Class Notes on Canvas Assignment: Retrieve initial data (t)
2	Session 4	TBD	Initial data analysis	Reading: Class Notes on Canvas Assignment: Data Dictionary (t)
3	Session 5	TBD	Initial data analysis	Reading: Class Notes on Canvas Assignment: Assessing the need for data manipulation (t)
3	Session 6	TBD	Exploratory data analysis	Reading: Class Notes on Canvas Assignment: Submit the initial Data Description report (t)
4	Session 7	TBD	Midterm Exam	In Class Midterm Exam (i)
4	Session 8	TBD	Assessing the proposed modeling approach that meets the business analytics project objective	Reading: Class Notes on Canvas Assignment: Describe applicable modeling approaches (t)
5	Session 9	TBD	Comparing initial data received with modeling approach	Reading: Class Notes on Canvas Assignment: Assessment about adequacy of initial data (t)
5	Session 10	TBD	Developing a data wrangling / data munging approach	Reading: Class Notes on Canvas Assignment: Assessing variable adequacy for modeling approach (t)
6	Session 11	TBD	Conducting data preparation for modeling	Reading: Class Notes on Canvas Assignment: Techniques for data munging (t)
6	Session 12	TBD	Completing data preparation and documenting the final modeling dataset/s	Reading: Class Notes on Canvas Assignment: Report on data wrangling and transformations (t)
7	Session 13	TBD	Finishing the Data Description Report	Reading: Class Notes on Canvas Assignment: Submit the final Data Description Report (t)
7	Session 14	TBD	Briefing the partner organization on progress	Assignment: Team Presentation (t) Final Exam Review
8	Session 15	TBD	Final Exam	In class Final Exam (i)

Legend: (i) = individual assignment; (t) = team assignment

Evaluation and Grading Criteria

The current grading plan is listed below. Class participation is inclusive of both attendance as well as providing meaningful discussion during class. There is a total of 450 points currently planned during the course. The breakout of the points by assignment follows:

Graded Activity	Effort	Points per Assignment
Determine the Business Objective	Team	20
First meeting with project partner	Team	20
Retrieve initial data	Team	20
Data Dictionary	Team	20
Assessing the need for data manipulation	Team	20
Submit the Data Description report	Team	20
In Class Midterm Exam	Individual	70
Describe applicable modeling approaches	Team	20
Assessment about adequacy of initial data	Team	20
Assessing variable adequacy for modeling approach	Team	20
Techniques for data munging	Team	15
Report on data wrangling and transformations	Team	15
Submit the final Data Description Report	Team	20
Team Presentation	Team	50
In class Final Exam	Individual	100
Total Points		450

Criteria for grading activities will be provided on Canvas along with specific directions for completing the activity.

Because over 60% of the grade in this course is determined by team participation, an assessment of contributions by each member of each team will be requested as part of the Final Team Project. Members who are assessed as not contributing equitably to the team projects will receive an individual adjustment to the team assignment grades. Team members are encouraged to confidentially identify problems within teams to me early in the team assignments. This permits there to be an opportunity to intervene with team members before the final assessment is submitted.

Late or Missed Assignments

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Grading Scale and Grading Policies for Assigning Grade Points

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The grading scale will be as follows:

Grade	Grade Point Average	Score (in percent)
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B-	2.67	80.0-83.9
C+	2.33	77.0-79.9
C	2.00	74.0-76.9
C-	1.67	70.0-73.9
D	1.00	60.0-69.9
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I reserve the right to adjust the grading scale, if necessary, to achieve a proper distribution of performance among the class. You can find information about the UF grading policies in the Graduate Student Handbook at:

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Required and Recommended Textbooks, Readings, and Class Notes

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Textbooks – The required textbooks should have been acquired in the prerequisite course QMBXXXX – Analytics Processes for Business – Bootcamp. There are two **required texts** associated with this course. The **required texts** are:

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A **free online version** of this book is available at: <https://rafalab.github.io/dsbook/> . A free PDF version of this book is available online at: <https://leanpub.com/datasciencebook>

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accommodation letter with their instructor and discuss their access needs, as early as possible in the module.

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Online Course Evaluation Process

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Honor Code Reminder

UF students are bound by The Honor Pledge which states, “We, the members of the University of Florida community, pledge to hold ourselves and our peers to the highest standards of honor and integrity by abiding by the Honor Code. On all work submitted for credit by students at the University of Florida, the following pledge is either required or implied: “On my honor, I have neither given nor received unauthorized aid in doing this assignment.” The Honor Code (<http://www.dso.ufl.edu/sccr/process/student-conduct-honorcode/>) specifies several behaviors that are in violation of this code and the possible sanctions. Furthermore, you are obligated to report any condition that facilitates academic misconduct to appropriate personnel. If you have any questions or concerns, please consult with the instructor or TAs in this class.”

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Class Demeanor Expectations

You are in a graduate program and soon to enter the business workforce. In the business workforce environment, you will have to make choices based on the norms for that work environment related to the use of your cell phones and using laptops in business meetings. To practice how you will probably need to operate in that environment, I request that cell phone ringers be silenced during class and that laptop speakers be set to silent. Exercise professional decision-making about how you use your electronic devices while in class.

If you are late to class or need to leave class for appointments or emergencies, please be respectful of your fellow students and the professor. Be as quiet as possible when leaving or entering.

Assurance of Learning

The University of Florida MBA program participates in the Association to Advance Collegiate Schools of Business (AACSB) approach to Assurance of Learning (AOL) objectives. The QMB6XXX course is aligned to the AOL goals and objectives below:

Goal 1: Demonstrate competency across business disciplines.

1A. Objective: Apply the essential elements of core business principles to analyze and evaluate problems and to construct and implement solutions in the business environment.

Goal 2: Demonstrate knowledge and understanding of leadership skills and styles appropriate for working with a variety of individual and groups.

2A. Objective: Apply knowledge of core leadership skills to analyze and evaluate problems, choose from and generate alternative solutions, for the purpose of affecting organizational change or influencing others.

Goal 3: Demonstrate critical thinking.

3A. Employ appropriate analytical models and apply critical reasoning processes to evaluate evidence, select among alternatives, and generate creative options in furtherance of effective decision-making.

Goal 4: Possess effective communication skills.

4A. Write business documents clearly, concisely, and analytically

4B. Speak in groups and in public clearly, concisely, and analytically, with appropriate use of visual aide.

Course|New for request 14807

Info

Request: New Course - Analytics Practicum 2

Description of request: This course is for the New BA Track in ISOM. The course is designed to engage students in solving “real world” business analytics problems.

Submitter: Elizabeth Thomas elizabeth.thomas@warrington.ufl.edu

Created: 3/11/2020 3:35:30 PM

Form version: 2

Responses

Recommended Prefix QMB

Course Level 6

Course Number XXX

Category of Instruction Intermediate

Lab Code None

Course Title Analytics Practicum 2

Transcript Title Analytics Practicum 2

Degree Type Graduate

Delivery Method(s) On-Campus

Co-Listing No

Effective Term Earliest Available

Effective Year Earliest Available

Rotating Topic? No

Repeatable Credit? No

Amount of Credit 1

S/U Only? No

Contact Type Regularly Scheduled

Weekly Contact Hours 1

Course Description This course is designed to engage you in solving “real world” business analytics problems. You will be a part of a small team of students that work with a business or organization. In this second practicum module, the focus will be on the modeling steps of the analytics process.

Prerequisites Analytics Practicum 1

Co-requisites None

Rationale and Placement in Curriculum This course is for the Business Analytics track. It is the third in a series of analytics courses intended to prepare students to work on practicum projects with companies.

Course Objectives The ultimate objective of the practicum is to prepare you to be a key part of a business analytics team and perform the actions of a standard analytics process. This second course encompasses the Modeling Step of the business analytics process.

Course Textbook(s) and/or Other Assigned Reading Irizarry, R. (2020). Introduction to Data Science: Data Analysis and Prediction Algorithms with R. Boca Raton, Florida: Taylor and Francis Group.

Carroll, J. (2019). Beyond Spreadsheets with R: A beginners guide to R and RStudio. Shelter Island, NY: Manning Publications Co.

Weekly Schedule of Topics 1 Session 1 TBD Modeling approaches for business problems

• Reading: Class Notes on Canvas Assignment: Developing the modeling approach (t)

1 Session 2 TBD What does a good expected business analytics modeling outcome

look like? • Reading: Class Notes on Canvas

• Assignment: Modeling approach agreement with analytics partner organization (t)

2 Session 3 TBD Identifying key modeling assumptions • Reading: Class Notes on Canvas

• Assignment: What are your key modeling assumptions? (t)

- 2 Session 4 TBD Preparing Training and Test datasets • Reading: Class Notes on Canvas
 - Assignment: Approach for separating data into Training and Test datasets (t)
- 3 Session 5 TBD Developing modeling testing criteria to measure model effectiveness
 - Reading: Class Notes on Canvas
 - Assignment: Model test plan (t)
- 3 Session 6 TBD Building models and assessing variable contribution to outcomes
 - Reading: Class Notes on Canvas
 - Assignment: None
 - Review for Midterm Exam
- 4 Session 7 TBD Midterm Exam • In Class Midterm Exam (i)
- 4 Session 8 TBD Building models and assessing variable contribution to outcomes
 - Reading: Class Notes on Canvas
 - Assignment: Report on model and variable outcomes (t)
- 5 Session 9 TBD Assessing your model using your model test plan
 - Reading: Class Notes on Canvas
 - Assignment: Report on model assessment against Test data (t)
- 5 Session 10 TBD Assess the need to develop alternative models •
 - Reading: Class Notes on Canvas
 - Assignment: Recommendation for model adjustment (t)
- 6 Session 11 TBD Assess the need for additional data • Reading: Class Notes on Canvas
 - Assignment: Recommendation about the need for additional data (t)
- 6 Session 12 TBD Assess the need for additional data manipulation (i.e. wrangling and munging) • Reading: Class Notes on Canvas
 - Assignment: Recommendation concerning the need for further data manipulation (t)
- 7 Session 13 TBD Develop final model
 - Reading: Class Notes on Canvas
 - Assignment: None
- 7 Session 14 TBD What is included in a modeling report? • Reading: Class Notes on Canvas
 - Assignment: Final Model report (t)
 - Final Exam Review
- 8 Session 15 TBD Final Exam • In class Final Exam (i)

Grading Scheme The current grading plan is listed below. Class participation is inclusive of both attendance as well as providing meaningful discussion during class. There is a total of 405 points currently planned during the course. The breakout of the points by assignment follows:

Developing the modeling approach	Team	20
Modeling approach agreement with analytics partner organization	Team	20
What are your key modeling assumptions?	Team	20
Approach for separating data into Training and Test datasets	Team	20
Model test plan	Team	20
In Class Midterm Exam	Individual	70
Report on model and variable outcomes	Team	20
Report on model assessment against Test data	Team	20
Recommendation for model adjustment	Team	15
Recommendation about the need for additional data	Team	15
Recommendation concerning the need for further data manipulation	Team	15
Final Model report	Team	50
In class Final Exam	Individual	100

Instructor(s) Jim Hoover
Attendance & Make-up Yes
Accomodations Yes
UF Grading Policies for assigning Grade Points Yes
Course Evaluation Policy Yes

QMBXXXX – Analytics Practicum 2

Professor: Dr. Jim Hoover

Office:

Stuzin 264

Telephone: 352-294-0410

Email:

jim.hoover@warrington.ufl.edu

Office Hours: Tuesday, Thursday 08:30 to 09:20 a.m. (Schedule an appointment by email)

Term:

TBD

Section:

TBD

Location: TBD

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Course Prerequisites

- This course is an integrated portion of the practicum related to the MS-ISOM track - Business Analytics. The prerequisite course is QMBXXXX – Analytics Practicum 1.

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Course Description

This course is designed to engage you in solving “real world” business analytics problems. You will be a part of a small (4 to 5 member) team of students that work with a business or organization to analytically solve a problem. Businesses and organizations who partner with the University will provide the business problems to be solved and the datasets that students will use to develop business analytics models and visualizations. These business and organizational partners will also continue involvement with the business analytics team throughout the practicum to ensure that questions are answered, additional data is provided when required, and the team’s recommendations are relevant to the partner organization.

In this second practicum module, the focus will be on the modeling steps of the analytics process. Student teams will work with the business or organization to:

- Agree upon the modeling approach that aligns with the expected business outcome
- Develop a list of key modeling assumptions for the modeling technique selected
- Separate data into Train and Test datasets
- Develop test criteria to assess model effectiveness
- Build models and assess variable contribution to model outcome
- Perform model assessment using test criteria
- Assess the need to develop alternative models
- Assess the need for additional data
- Assess the need for additional data manipulation (i.e. wrangling and munging)
- Develop final model
- Develop modeling report

In the next practicum course, you will develop the final briefing for the partner organization.

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Course Objectives

- The ultimate objective of the practicum is to prepare you to be a key part of a business analytics team and perform the actions of a standard analytics process. This second course encompasses the Modeling Step of the business analytics process.

Weekly Course Schedule of Topics and Assignments

Holidays –

Week	Class	Date	Topics	Assignments
1	Session 1	TBD	Modeling approaches for business problems	Reading: Class Notes on Canvas Assignment: Developing the modeling approach (t)
1	Session 2	TBD	What does a good expected business analytics modeling outcome look like?	Reading: Class Notes on Canvas Assignment: Modeling approach agreement with analytics partner organization (t)
2	Session 3	TBD	Identifying key modeling	Reading: Class Notes on Canvas

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			assumptions	Assignment: What are your key modeling assumptions? (t)
2	Session 4	TBD	Preparing Training and Test datasets	Reading: Class Notes on Canvas Assignment: Approach for separating data into Training and Test datasets (t)
3	Session 5	TBD	Developing modeling testing criteria to measure model effectiveness	Reading: Class Notes on Canvas Assignment: Model test plan (t)
3	Session 6	TBD	Building models and assessing variable contribution to outcomes	Reading: Class Notes on Canvas Assignment: None Review for Midterm Exam
4	Session 7	TBD	Midterm Exam	In Class Midterm Exam (i)
4	Session 8	TBD	Building models and assessing variable contribution to outcomes	Reading: Class Notes on Canvas Assignment: Report on model and variable outcomes (t)
5	Session 9	TBD	Assessing your model using your model test plan	Reading: Class Notes on Canvas Assignment: Report on model assessment against Test data (t)
5	Session 10	TBD	Assess the need to develop alternative models	Reading: Class Notes on Canvas Assignment: Recommendation for model adjustment (t)
6	Session 11	TBD	Assess the need for additional data	Reading: Class Notes on Canvas Assignment: Recommendation about the need for additional data (t)
6	Session 12	TBD	Assess the need for additional data manipulation (i.e. wrangling and munging)	Reading: Class Notes on Canvas Assignment: Recommendation concerning the need for further data manipulation (t)
7	Session 13	TBD	Develop final model	Reading: Class Notes on Canvas Assignment: None
7	Session 14	TBD	What is included in a modeling report?	Reading: Class Notes on Canvas Assignment: Final Model report (t) Final Exam Review
8	Session 15	TBD	Final Exam	In class Final Exam (i)

Legend: (i) = individual assignment; (t) = team assignment

Evaluation and Grading Criteria

The current grading plan is listed below. Class participation is inclusive of both attendance as well as providing meaningful discussion during class. There is a total of 405 points currently planned during the course. The breakout of the points by assignment follows:

Graded Activity	Effort	Points per Assignment
Developing the modeling approach	Team	20
Modeling approach agreement with analytics partner organization	Team	20
What are your key modeling assumptions?	Team	20
Approach for separating data into Training and Test datasets	Team	20
Model test plan	Team	20
In Class Midterm Exam	Individual	70
Report on model and variable outcomes	Team	20
Report on model assessment against Test data	Team	20
Recommendation for model adjustment	Team	15
Recommendation about the need for additional data	Team	15
Recommendation concerning the need for further data manipulation	Team	15
Final Model report	Team	50
In class Final Exam	Individual	100
Total Points		405

Criteria for grading activities will be provided on Canvas along with specific directions for completing the activity.

Free Rider Assessment

Because almost 60% of the grade in this course is determined by team participation, an assessment of contributions by each member of each team will be requested as part of the Final Team Project. Members who are assessed as not contributing equitably to the team projects will receive an individual adjustment to the team assignment grades. Team members are encouraged to confidentially identify problems within teams to me early in the team assignments. This permits there to be an opportunity to intervene with team members before the final assessment is submitted.

Late or Missed Assignments

Late or missed assignments may not receive full point credit or may be assigned 0 points. Contact me if you know in advance that you will be late with an assignment or will miss an assignment (typically due to an excused absence). Acceptable notification and my concurrence with the reasons for the late or missing assignment will receive more favorable treatment than notification after an assignment is due.

If you have technical issues that prevent you from submitting assignments on schedule, please ensure that you contact the TAC Student Information Technology Support Center to document your problem and help resolve the issue. Information on how to contact Student Support can be found at:

<https://warrington.ufl.edu/information-technology-support-programs/technical-services/tac-student-support/>

Grading Scale and Grading Policies for Assigning Grade Points

The grading scale will be as follows:

Grade	Grade Point Average	Score (in percent)
A	4.00	94.0 or above
A-	3.67	90.0-93.9
B+	3.33	87.0-89.9
B	3.00	84.0-86.9
B-	2.67	80.0-83.9
C+	2.33	77.0-79.9
C	2.00	74.0-76.9
C-	1.67	70.0-73.9
D	1.00	60.0-69.9
E	0.00	Less than 60.0

I reserve the right to adjust the grading scale, if necessary, to achieve a proper distribution of performance among the class. You can find information about the UF grading policies in the Graduate Student Handbook at:

<http://www.graduateschool.ufl.edu/media/graduate-school/pdf-files/handbook.pdf> .

Additional information about the University of Florida's Graduate School Grading Policies are further explained at the following link:

<https://catalog.ufl.edu/UGRD/academic-regulations/grades-grading-policies/> .

Required and Recommended Textbooks, Readings, and Class Notes

Textbooks – The required textbooks should have been acquired in the prerequisite course QMBXXXX – Analytics Processes for Business – Bootcamp. There are two **required texts** associated with this course. The **required texts** are:

Irizarry, R. (2020). *Introduction to Data Science: Data Analysis and Prediction Algorithms with R* . Boca Raton, Florida: Taylor and Francis Group.

This book is available at the U.F. Bookstore and on Amazon.com. The approximate cost should be \$89.

A **free online version** of this book is available at: <https://rafalab.github.io/dsbook/> . A free PDF version of this book is available online at: <https://leanpub.com/datasciencebook>

Carroll, J. (2019). *Beyond Spreadsheets with R: A beginners guide to R and RStudio* . Shelter Island, NY: Manning Publications Co.

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This book is available at the U.F. Bookstore and on Amazon.com. The approximate cost should be between \$38 - \$50.

PDF and Kindle versions of this book is available from [Manning.com](https://www.manning.com) for \$40.00. The link is: <https://www.manning.com/books/beyond-spreadsheets-with-r> .

Separately, I recommend a few **OPTIONAL** books for those looking for excellent overall reference books on the effective use of R.

Kabacoff, R. (2020). *R in Action: Third Edition* . Shelter Island, NY: Manning Publications, Inc.

This book is available from Amazon.com or directly from the publisher at: Manning.com. Depending on whether you buy the electronic (PDF) version or the paperback copy, the cost should be approximately \$40-60.

While this book is available at Amazon.com. The R in Action book is also available at [Manning.com](https://www.manning.com) . The Manning.com website is a good source of books and training on Analytics methods and software.

Wickham, H. & Golemund, G. (2017). *R for Data Science: Import, Tidy, Transform, Visualize, and Model Data* . Sebastopol, CA.

This book is available at the Amazon.com. The approximate cost should be \$34.

A **free** online version of this book is available at: <https://r4ds.had.co.nz> . The source code for the book is available at: <https://github.com/hadley/r4ds> .

Class Notes, R-code, and Data – Class notes for this course will be available in Canvas - <https://ufl.instructure.com> .

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Attendance, Make-up Exams, and Other Work

Students are responsible for satisfying all academic objectives as defined by the professor. Absences count beginning with the first class meeting and are incorporated into the participation grade. Additionally, you will be evaluated based on your contribution to your team. Attendance at team meetings is important as well. This will be assessed by each of your teammates as part of the final presentation report submission.

In general, acceptable reasons for absence from or failure to participate in class include illness, serious family emergencies, special curricular requirements (e.g., judging trips, field trips, professional conferences), military obligation, severe weather conditions, religious holidays, and participation in official university activities such as music performances, athletic competition or debate. Absences from class for court-imposed legal obligations (e.g., jury duty or subpoena) must be excused. Other reasons also may be approved.

Students shall be permitted a reasonable amount of time to make up the material or activities covered in their absence.

Students cannot participate in the class unless they are registered officially or approved to audit with evidence of having paid audit fees. The Office of the University Registrar provides official class rolls to instructors.

Students in this class must participate in at least one of the first two class meetings, or risk being dropped from the course. If you cannot attend at least one those initial classes, please contact me using the contact information at the top of the Syllabus. If you are dropped from this course, the department will notify you.

Attendance in this class is part of the overall grading criteria. Additionally, missing a class also means that the associated assignments will potentially be affected or not accepted (for those that are to be completed in class). I highly encourage attendance. Missing an excessive number of classes may result in a failing grade for the course.

Accommodations for Students with Disabilities

Students with disabilities who experience learning barriers and would like to request academic accommodations should connect with the disability Resource Center by visiting <https://disability.ufl.edu/students/get-started/> . It is important for students to share their accommodation letter with their instructor and discuss their access needs, as early as possible in the module

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in the module.

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Online Course Evaluation Process

Students are expected to provide professional and respectful feedback on the quality of instruction in this course by completing course evaluations online via GatorEvals. Guidance on how to give feedback in a professional and respectful manner is available at <https://gatorevals.aa.ufl.edu/students/> . Students will be notified when the evaluation period opens, and can complete evaluations through the email they receive from GatorEvals, in their Canvas course menu under GatorEvals, or via <https://ufl.bluera.com/ufl/> . Summaries of course evaluation results are available to students at <https://gatorevals.aa.ufl.edu/public-results/> .

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Class Demeanor Expectations

You are in a graduate program and soon to enter the business workforce. In the business workforce environment, you will have to make choices based on the norms for that work environment related to the use of your cell phones and using laptops in business meetings. To practice how you will probably need to operate in that environment, I request that cell phone ringers be silenced during class and that laptop speakers be set to silent. Exercise professional decision-making about how you use your electronic devices while in class.

If you are late to class or need to leave class for appointments or emergencies, please be respectful of your fellow students and the professor. Be as quiet as possible when leaving or entering.

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Assurance of Learning

The University of Florida MBA program participates in the Association to Advance Collegiate Schools of Business (AACSB) approach to Assurance of Learning (AOL) objectives. The QMB6XXX course is aligned to the AOL goals and objectives below:

Goal 1: Demonstrate competency across business disciplines.

1A. Objective: Apply the essential elements of core business principles to analyze and evaluate problems and to construct and implement solutions in the business environment.

Goal 2: Demonstrate knowledge and understanding of leadership skills and styles appropriate for working with a variety of individual and groups.

2A. Objective: Apply knowledge of core leadership skills to analyze and evaluate problems, choose from and generate alternative solutions, for the purpose of affecting organizational change or influencing others.

Goal 3: Demonstrate critical thinking.

3A. Employ appropriate analytical models and apply critical reasoning processes to evaluate evidence, select among alternatives, and generate creative options in furtherance of effective decision-making.

Goal 4: Possess effective communication skills.

4A. Write business documents clearly, concisely, and analytically

4B. Speak in groups and in public clearly, concisely, and analytically, with appropriate use of visual aide.

Course|New for request 14808

Info

Request: New Course - Analytics Practicum 3

Description of request: This course is for the New BA Track in ISOM. The course is designed to engage students in solving “real world” business analytics problems.

Submitter: Elizabeth Thomas elizabeth.thomas@warrington.ufl.edu

Created: 3/11/2020 3:22:02 PM

Form version: 1

Responses

Recommended Prefix QMB

Course Level 6

Course Number XXX

Category of Instruction Intermediate

Lab Code None

Course Title Analytics Practicum 3

Transcript Title Analytics Practicum 3

Degree Type Graduate

Delivery Method(s) On-Campus

Co-Listing No

Effective Term Earliest Available

Effective Year Earliest Available

Rotating Topic? No

Repeatable Credit? No

Amount of Credit 1

S/U Only? No

Contact Type Regularly Scheduled

Weekly Contact Hours 1

Course Description This course is designed to engage you in solving “real world” business analytics problems. You will be a part of a small team of students that work with a business or organization. In this third module, the focus will be on the Evaluation and Deployment steps of the analytics process.

Prerequisites Analytics Practicum 2

Co-requisites None

Rationale and Placement in Curriculum This course is for the Business Analytics track. It is the fourth in a series of analytics courses intended to prepare students to work on practicum projects with companies.

Course Objectives The ultimate objective of the practicum is to prepare you to be a key part of a business analytics team and perform the actions of a standard analytics process. This third course encompasses the Evaluation and Deployment steps of the business analytics process.

Course Textbook(s) and/or Other Assigned Reading Irizarry, R. (2020). Introduction to Data Science: Data Analysis and Prediction Algorithms with R. Boca Raton, Florida: Taylor and Francis Group.

Carroll, J. (2019). Beyond Spreadsheets with R: A beginners guide to R and RStudio. Shelter Island, NY: Manning Publications Co.

Weekly Schedule of Topics

1	Session 1	TBD	Jointly assess the effectiveness of the model in meeting the original business purpose	•	Reading: Class Notes on Canvas
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1	Session 2	TBD	Jointly assess the effectiveness of the model in meeting the original business purpose	•	Reading: Class Notes on Canvas
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• Assignment: Meeting report with analytics partner organization (t)

2	Session 3	TBD	Jointly assess the effectiveness of the model in meeting the agreed upon business outcome	•	Reading: Class Notes on Canvas
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- Assignment: None
- 2 Session 4 TBD Jointly assess the effectiveness of the model in meeting the agreed upon business outcome • Reading: Class Notes on Canvas
- Assignment: Meeting report with analytics partner organization (t)
- 3 Session 5 TBD Preparing the analytics partner presentation • Reading: Class Notes on Canvas
- Assignment: None
- 3 Session 6 TBD Preparing the analytics partner presentation: Data sources & data manipulation • Reading: Class Notes on Canvas
- Assignment: None
- Review for Midterm Exam
- 4 Session 7 TBD Midterm Exam • In Class Midterm Exam (i)
- 4 Session 8 TBD Preparing the analytics partner presentation: Model assumptions & model effectiveness • Reading: Class Notes on Canvas
- Assignment: None
- 5 Session 9 TBD Preparing the analytics partner presentation: Model outcome relationship to business problem • Reading: Class Notes on Canvas
- Assignment: Draft report (t)
- 5 Session 10 TBD Preparing the analytics partner presentation: Potential deployment steps and post-implementation model monitoring • Reading: Class Notes on Canvas
- Assignment: None
- 6 Session 11 TBD Final presentation and report preparation considerations • Reading: Class Notes on Canvas
- Assignment: Completion of the final presentation (t)
- 6 Session 12 TBD Presentation to analytics partner • Reading: None
- Assignment: Final presentation to analytics partner (t)
- 7 Session 13 TBD Presentation to analytics partner • Reading: None
- Assignment: Final presentation to analytics partner (t)
- 7 Session 14 TBD Final project report to Professor • Reading: None
- Assignment: Final project report to professor (t)
- Final Exam Review
- 8 Session 15 TBD Final Exam • In class Final Exam (i)

Grading Scheme The current grading plan is listed below. Class participation is inclusive of both attendance as well as providing meaningful discussion during class. There is a total of 420 points currently planned during the course. The breakout of the points by assignment follows:

Meeting report with analytics partner organization	Team	20
Meeting report with analytics partner organization	Team	20
In Class Midterm Exam Individual		70
Draft report	Team	30
Completion of the final presentation	Team	30
Final presentation to analytics partner	Team	100
Final project report to professor	Team	50
In class Final Exam	Team	100

Instructor(s) Jim Hoover

Attendance & Make-up Yes

Accommodations Yes

UF Grading Policies for assigning Grade Points Yes

Course Evaluation Policy Yes