



THE UNIVERSITY OF TEXAS AT TYLER
Soules College of Business



Spring 2021

MARK 4340.002 Consumer Insights
Category Management Certified Course

COB 251 | T/TH 11:00 am – 12:20 pm

INSTRUCTOR INFORMATION

Name: Dr. Kay Byun (PhD, MBA, MA)
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Office Hours: T/Th 12:30 pm – 2:00 pm or by appointment

COURSE INFORMATION

Course Description

Quantitative and qualitative approach in order to obtain insights from consumer purchase behaviors and retail data. Focus will be on how to read market trends and consumer preference from retail data and metrics. The course will utilize technology to gain experience with the development of the various metrics. To enhance the understanding of the use of data in making retailing decisions, participation in a retail/big data analysis will be required.

Course Objectives / Expected Learning Outcomes

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

- Concepts of marketing sales and consumer data analysis
- Role of Key Performance Metrics (KPI's) in retailing, perceptual mapping, Customer Lifetime Value metrics, Syndicated scanner data analysis (IRI), and Retail Point-of-sale (POS) data analysis
- Top brands' performance practices and metrics
- Segmentation based on consumer purchase behaviors (i.e., heavy and light user) analysis
- Familiarity in the generation of data for use in analysis using industry data using **Excel/Tableau**
- Critical thinking skill development associated with retail data

Prerequisites

MARK 3311 (Principles of Marketing) - Any student not meeting prerequisites will be administratively withdrawn from the class.

Textbook & Course Materials

(Required 1) DATACAMP (FREE access through this class for 6 months)



“This class is supported by DataCamp, the most intuitive learning platform for data science. Learn Tableau, R, Python and SQL the way you learn best through a combination of short expert videos and hands-on-the-keyboard exercises. Take over 100+ courses by expert instructors on topics such as importing data, data visualization or machine learning and learn faster through immediate and personalized feedback on every exercise.”

Multiple courses in DataCamp related to data analysis is Excel will be assigned throughout the semester. Students are required to complete the courses to get full credit. A statement of accomplishment from DataCamp will be given for the completion of each course.

To start the courses, students will receive an invitation email before the first class.

(Required 2) Certified Professional Category Analyst (CPCA) Modules (free access):



This course is proudly certified by the [Category Management Association](#). This certification program aims to solidify category knowledge and lay the foundation for success in the category management field by emphasizing industry knowledge, history, and basic data analysis. The skills and category expertise developed through the course can help students to establish themselves as front-line resources for retail business. The Category Management positions are highly demanded in the industry. For more information, you can visit Category Management Association at <http://www.catman.global/certification/certification-overview>.

Four Marketing courses at University of Texas at Tyler include a required component in which the student will complete an online certification from the Category Management Association. These modules are part of [10 Certified Professional Category Analyst \(CPCA\) modules](#) certified throughout various marketing courses, which will culminate in making the students be eligible to sit for a final Category Management exam outside of University of Texas at Tyler where, upon successfully passing the exam, the student will become a **Certified Professional Category Analyst**.

Access: Students will get an email containing the access information such as **ID and Password** from Learning Evolution (Nancy Lambert at lambert@nlearningevolution.com in charge of the modules). All questions regarding the access or technical issues should be addressed to her. With the access information, students will complete the module at <https://lesq.elliportal.com/>.

Three modules covered in this course:

- CPCA 104 Promotion Analysis (Basic)
- CPCA 108 Syndicated Scanner Data Analysis (Basic)
- CPCA 110 Retailer POS Data Analysis (Basic)

How to pass modules? : Students are required to take the modules at <https://lesq.elliportal.com/>, including a pre-test, a content module, and a post-test. **Once a post-test score is more than 80%, students will pass the module and get the credit in the course.** Students can retake the post-test when they cannot pass 80% at the first round. Once completed, 30 points for each module will be given in Canvas after due date.

COURSE SCHEDULE

Delivery	Date	Topic	Source	Due
Online/DataCamp	1/12 (TU)	Introduction to Spreadsheets	DataCamp	DataCamp
Online/DataCamp	1/14 (TH)	Conditional Formatting in Spreadsheets	DataCamp	DataCamp
Online/DataCamp	1/19 (TU)	Data Analysis in Spreadsheets	DataCamp	DataCamp
Online/DataCamp	1/21 (TH)	Intermediate Spreadsheets	DataCamp	DataCamp
In-Class	1/26 (TU)	Introduction to Consumer Insights		
In-Class	1/28 (TH)	Introduction to Data Analytics and Data Type		
In-Class	2/2 (TU) - 2/4 (TH)	Relationships among variables and visual presentation		
Online/DataCamp	2/4 (TH)	Pivot Tables in Spreadsheets	DataCamp	DataCamp
Online	2/9 (TU)	EXAM 1		
In-Class	2/11 (TH) – 2/16 (TU)	Understanding KPI: Sales Dashboard		
Online/DataCamp	2/16 (TU)	Data Visualization in Spreadsheets	DataCamp	DataCamp
Online	2/18 (TH) – 2/23 (TU)	Assignment 1: KPI and Performance Dashboard	Excel/Tableau	
In-Class	2/25 (TH) – 3/2 (TU)	Understanding brand positioning and product superiority: Positional mapping		
Online	3/4 (TH)	Assignment 2: Positional Mapping	Excel/Tableau	
In-Class	3/16 (TU)	Understanding Marketing Metrics		CPCA
In-Class	3/18 (TH) – 3/23 (TU)	Understanding brand/category performance: Retailing POS data analysis		
Online	3/25 (TH)	Assignment 3 Part 1: Retailing POS data analysis	Tableau	
In-Class	3/30 (TU) – 4/1 (TH)	Understanding consumer preference and market trends: Syndicated Scanner Data Analysis		
Online	4/6 (TU)	Assignment 3 Part 2: Syndicated Scanner Data Analysis	Tableau	
In-Class	4/8 (TH) – 4/13 (TU)	Understanding consumer segments and developing marketing strategy		
Online	4/15 (TH)	Assignment 3 Part 3: Syndicated Scanner/Panel Data Analysis	Tableau	
In-Class	4/20 (TU) – 4/22 (TH)	Assignment 3 Group Presentation	Tableau	

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

GRADING POLICIES

Grading Scale

Evaluation Items	Scores	Due
TOTAL Exam	_____ (200 points)	
EXAM 1	_____ (200 points)	2/9 (TU)
TOTAL ASSIGNMENT	_____ (600 points)	
Assignment 1	_____ (200 points)	2/23 (TU)
Assignment 2	_____ (100 points)	3/4 (TH)
Assignment 3	_____ (300 points)	4/20 (TU)
Activities (100 pnt @ average)	_____ (100 points)	
CPCA MODULE (30 pnt @ 3)	_____ (90 points)	3/16 (TU)
DataCamp Assignments (50 pnt@6)	_____ (300 points)	See the schedule
TOTAL	_____ (1290 points)	

Letter Grade Assignment

The final grade will be determined based on the percentage of scores obtained out of the total possible points as follows:

F will be given when the attendance does not meet the minimum requirement or when the total score is below 60% of the total possible points.

90% > : A
80-89%: B
70-79%: C
60-69%: D
Below 60%: F

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

COURSE CONTENTS

Assignments (600 points): There will be 3 assignments throughout the semester. Each assignment must be submitted as a short report on the given topic with appropriate charts, interpretations, and managerial suggestions. Each assignment should include a significant level of analysis using tables and charts as well as a logical and intriguing storytelling based on the results to provide meaningful managerial suggestions. Also, it is required to submit a file that contains whole analyses that a student conducted for the assignment (e.g., Excel or Tableau). Throughout the assignments, students are expected to gain both logical thinking and a practical ability to analyze data and present the results, which are the common methods used in the professional world. **No late submission** will be accepted.

DataCamp Assignments (300 points): Students should complete six courses in DataCamp. The assignment schedule is indicated in the above course schedule. A statement of accomplishment of each course should be submitted before due. For more details, read DataCamp Assignments under Canvas Modules.

Exam (200 points): In the exam, students will be asked to solve multiple-choice questions, and interpret data tables and charts, suggest strategic opinions, and often make tables and charts with given questions and data.

Activities (100 points, Average): Students will have some activities for the contents they learn. The average score of all activities will be included in the grade.

CPCA Modules (90 points): Students should take **THREE** modules for the Category Management Certification. For each module, students are required to take a pre-test, a content module, and a post-test, and **PASS the post-test**. Students can try the post-test two times to pass a corresponding module. Once the post-test score is **more than 80%**, then a student will pass the module and get the credit in this course. However, **when a student FAILS to pass the post-test, there will be No point**. All modules should be completed by due dates stated in the course schedule above. No late submission accepted.

ATTENDANCE POLICIES

If you are not able to attend the class in person for any reason, you should contact the instructor prior to the class. If you fail to make more than half of the required in-person attendance, you will get an 'F' as your final grade.

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

Student Absence due to Religious Observance

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

Student Absence for University-Sponsored Events and Activities

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

COURSE POLICIES

Important Covid-19 Information for Classrooms and Laboratories

Students are **required to wear face masks covering their nose and mouth, and follow social distancing guidelines**, at all times in public settings (including classrooms and laboratories), as specified by [Procedures for Fall 2020 Return to Normal Operations](#). The UT Tyler community of Patriots views adoption of these practices consistent with its [Honor Code](#) and a sign of good citizenship and respectful care of fellow classmates, faculty, and staff.

Students who are feeling ill or experiencing symptoms such as sneezing, coughing, or a higher than normal temperature will be excused from class and should stay at home and may join the class remotely. Students who have difficulty adhering to the Covid-19 safety policies for health reasons are also encouraged to join the class remotely. Students needing additional accommodations may contact the Office of Student Accessibility and Resources at University Center 3150, or call (903) 566-7079 or email saroffice@uttyler.edu.

Recording of Class Sessions

Class sessions may be recorded by the instructor for use by students enrolled in this course. Recordings that contain personally identifiable information or other information subject to FERPA shall not be shared with individuals not enrolled in this course unless appropriate consent is obtained from all relevant students. Class recordings are reserved only for the use of students enrolled in the course and only for educational purposes. Course recordings should not be shared outside of the course in any form without express permission.

Concealed Handguns on Campus:

We respect the right and privacy of students who are duly **licensed** to carry **concealed** weapons in this class. License holders are expected to behave responsibly and keep a handgun secure and concealed. More information is available at <http://www.uttyler.edu/about/campus-carry/index.php>.

Soules College of Business Statement of Ethics:

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

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

Academic Dishonesty Statement

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

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

University regulations require the instructor to report all suspected cases of academic dishonesty to the Dean of Students for disciplinary action. In the event disciplinary measures are imposed on the student, it becomes part of

the students' official school records. Also, please note that the handbook obligates you to report all observed cases of academic dishonesty to the instructor.

Grade Replacement/Forgiveness and Census Date Policies

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

Each semester's Census Date can be found on the Contract itself, on the Academic Calendar, or in the information pamphlets published each semester by the Office of the Registrar. Failure to file a Grade Replacement Contract will result in both the original and repeated grade being used to calculate your overall grade point average.

Undergraduates are eligible to exercise grade replacement for only three course repeats during their career at UT Tyler; graduates are eligible for two grade replacements. Full policy details are printed on each Grade Replacement Contract.

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

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

State-Mandated Course Drop Policy

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

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

Disability/Accessibility Services

In accordance with Section 504 of the Rehabilitation Act, Americans with Disabilities Act (ADA) and the ADA Amendments Act (ADAAA) the University of Tyler at Texas offers accommodations to students with learning, physical and/or psychological disabilities. If you have a disability, including non-visible a diagnosis such as a learning disorder, chronic illness, TBI, PTSD, ADHD, or you have a history of modifications or accommodations in a previous educational environment, you are encouraged to visit <https://hood.accessiblelearning.com/UTTyler> and fill out the New Student application. The Student Accessibility and Resources (SAR) office will contact you when your application has been submitted and an appointment with an Accessibility Case Manager. For more information, including filling out an application for services, please visit the SAR webpage at <http://www.uttyler.edu/disabilityservices>, the SAR office located in the University Center, # 3150 or call 903.566.7079.

Social Security and FERPA Statement:

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

Emergency Exits and Evacuation:

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