

VICTORIA UNIVERSITY OF WELLINGTON
Te Whare Wananga o te Upoko o te Ika a Maui



VICTORIA UNIVERSITY OF
WELLINGTON
SCHOOL OF MARKETING AND
INTERNATIONAL BUSINESS

MARK 211

MARKETING MANAGEMENT

COURSE OUTLINE 2006



COURSE DESCRIPTOR

Marketing Management is a strategic function within the firm requiring skills in market analysis, identifying fundamental shifts in customer needs and buying patterns, and crafting key elements of the marketing mix into a coherent marketing strategy. This course develops both theoretical and applied aspects of formulating and implementing marketing strategies for products and services in different marketing environments. Central to the development of marketing strategies is an understanding of market definition and an analysis of demand.

Students of this course will also become familiar with essential financial terms in analysing marketing opportunities. It is almost always necessary to determine the economic consequences of alternative courses of action, or of alternative sets of assumptions, in the analysis of a marketing opportunity and the development of marketing strategies.

COURSE OBJECTIVES

After completion of this course, students should be able to:

1. Explain and apply marketing concepts underlying strategic marketing and tactical marketing.
2. Identify underlying factors that must be considered in developing a marketing strategy.
3. Apply techniques for undertaking strategic market analysis and formulating marketing strategies and marketing mix programs.
4. Apply financial problem-solving techniques to marketing opportunity analysis.

LECTURES

Wednesday 8.30 am - 10.20 am in RH 1
Friday 8.30 am - 9.20 am in RH 1

Commencing March 1 2006.

COURSE TEXTS

The required course texts for MARK 211 are:

1. J P Gultinan, GW Paul and TJ Madden, *Marketing Management Strategies and Programs*, 6th edition, McGraw-Hill, 1997 or 2003.
2. Nicholas Ashill, *Strategic Marketing Management Case Book*, McGraw-Hill, 2002.

Both texts can be purchased from the University Bookshop, and have been bundled together. For study purposes, you are strongly recommended to take notes from the Gultinan, Paul and Madden text. The *Strategic Marketing Management Case Book* has been specifically written to illustrate concepts advocated by Gultinan, Paul and Madden using New Zealand material.

It is particularly important that you read assigned chapters **before** attending each lecture and tutorial. Advanced preparation and participation will play a vital part in your reaching the objectives for the course. Each lecture will comprise two parts the first will use a lecture format; the second will involve problem analysis. The course controller of MARK 211 will demonstrate application of marketing management concepts to assist students to complete the internally assessed component of the course.

The following additional readings are also available in the Commerce Library if you would like further reading:

1. Dave Sutton and Tom Klien, *Enterprise Marketing Management: The New Science of Marketing*, 3 Day Loan
2. Roger Cartwright, *Mastering Marketing Management*, 3 Day Loan

STAFF INVOLVED IN MARK 211

Sarena Saunders, Lecturer in Marketing, Room 1102, Rutherford House, Telephone 463-6933, Email Sarena.Saunders@vuw.ac.nz. Sarena will be located in Rutherford House 1102 for student questions and discussions from 10.30 – 12.30 pm on Wednesdays. In addition, students can access the course controller using the Discussion Board forums on Blackboard.

METHOD OF ASSESSMENT

MARK 211 is assessed by an external examination (40%) and internal work (60%). The internal assessment is structured as follows:

Internal assessment

1.	Strategic Market Analysis Paper	40%
2.	Marketing Strategy Paper	20%
	Examination	40%
	Total	100%

TUTORIAL WORK

The preparation of tutorial material is an essential part of MARK 211. A tutorial list will be posted on the notice board in Rutherford House in Week 2 2006. This list will also be posted on Blackboard in the Tutorials folder. Tutorials will commence in **Week 3**, the week beginning **13 March 2006**. Although not assessed directly, this tutorial material relates to the two internally assessed papers. Details of tutorial preparation are attached. Preparation of this material is vital to the successful completion of these papers.

INTERNAL ASSESSMENT

You will be required to submit two assignments, Strategic Market Analysis Paper and Marketing Strategy Paper – details of which are contained later in this outline.

THE EXAMINATION

The examination will account for 40% of the student's overall mark. Students will be notified about the format of the exam during the last lecture. The Strategic Market Analysis Paper and Marketing Strategy Paper will provide essential learning material for the examination. Previous examination papers are located in Blackboard in the folder **Course Documents**.

ASSIGNMENTS

THE STRATEGIC MARKET ANALYSIS PAPER

Choose a product or service in a market of your choice (see the Banned Product list on page 8). Complete a strategic market analysis for this product or service. The paper should detail the relevant market for this product/service, primary and selective demand (market analysis), target marketing and competitive positioning and market measurement.

You must draw upon relevant articles in the marketing literature to support your work and attach these to the written report. The report should be no less than 3000 words and no more than 5000 words (excluding relevant tabulations, appendices etc).

Submission Date: **Monday 24 April 2006 at 4pm.** Please hand the assignment to the Marketing assignment box located in Rutherford House.

Guidelines for Assignment 1: Strategic Market Analysis Paper

Introduction: 500 words

Identify the product/service and provide a brief Industry background. Outline the objective of the paper.

Main Body (2000-4000 words)

What is the relevant market? Justify your choice.

Analyse primary demand/selective demand over past 3 years for this relevant market. How is primary/selective demand currently changing?

How is the relevant market segmented? Justify your choice of segmentation criteria.

Analyse competition in this relevant market.

Estimate market potential for this product/service.

What are the potential target markets for this product/service? Why?

Conclusion (500 words)

Summarise your findings pertaining to the relevant market, primary/selective demand changes, segmentation, competition, market measurement and choice of target markets and BRIEFLY outline the possible implications of your findings for marketing strategies and over the next 2 years (the starting point for Assignment 2).

Assignment One Structure

1. Introduction

- Product/service or company chosen
- Parameters of the question: what is the assignment asking you to do and how to you propose to answer
- Brief industry background

2. Main Body – Situational Analysis Key Steps

- Product/market structure
- Relevant Market and justification
- Primary Demand analysis
 - Buyer Identification
 - Factors affecting the willingness to buy
 - Factors affecting the ability to buy
- Changes in Primary Demand over the past 3 years
 - Have new forms/classes emerged over the past 3 years (as indicated in the product/market structure)?
 - Have forms/classes disappeared over the past 3 years?
 - What forms/classes are growing and why?
 - What forms/classes are declining and why?
 - Has Buyer ID changed over the past 3 years? If so in what way?
 - Has the willingness/ability to buy changed over the past 3 years? If so how?
- Selective Demand analysis
 - What does the decision-making process look like and why?
 - What are the relevant attributes in the buying process (determinant, defensive and optional)?
- Changes in Selective Demand over the past 3 years
 - Has the decision-making process of buyers' changed over the past 3 years? If so in what way?
 - Have there been changes in the importance buyers place on different attributes? If yes, in what way have attributes changed?
- What basis for segmenting the Relevant Market makes sense? Any? Why?
- Competitive Analysis of the Relevant Market
 - Who are the major competitors comprising the relevant market?
 - What are the competitive forces at work within the relevant market? (Porter's 5 forces model)
 - Competitor strength grids/strengths and weaknesses
 - Perceptual maps (positioning)
- Market Measurement – absolute and relative market potential (NPQ). Remember the objective here is to determine the existence or otherwise of a primary/selective demand GAP. Attempt to work NPQ but if this proves not possible because of a lack of information, go back to the key diagnostic questions given that these act as a proxy for market measurement. In other words:
 - Are there new buyers in the Relevant Market who have or could have the willingness/ability to buy?
 - Could the willingness/ability of existing customers be increased? For example, buy more often or buyer larger volumes?

-If the answer to both questions is NO, then a primary demand gap does NOT exist.
-Target Market Identification – what are the most attractive segments to target and why?
(Segmentation evaluation criteria, relative market potential, competition assessment findings and likely competitor reaction to what we do)

3. Conclusion

-Summary of key findings pertaining to the situational analysis
-Briefly, what are these findings telling you in terms of marketing strategy choice i.e. primary and/or selective demand?
-Market measurement findings
-Competitor assessment findings
-Segmentation evaluation findings
-Life Cycle analysis
-Resources and Internal Capabilities

THE MARKETING STRATEGY PAPER

Using the same product or service, write a paper outlining a suitable marketing strategy for the next 2 years. This paper should detail appropriate marketing strategies taking into consideration your findings from the Strategic Market Analysis Paper.

Submission Date: **Monday 22 May 2006 at 4pm.** Please hand the assignment to the Marketing assignment box located in Rutherford House.

Again, you must draw upon relevant articles in the marketing literature to support your work and attach these to the written report. The report should be no less than 1500 words and no more than 2500 words (excluding relevant tabulations, appendices etc).

Guidelines for Assignment 2: Marketing Strategy Paper

Introduction (500 words)

Briefly recap on main findings from assignment 1 (use summary).
Introduce the two types of marketing strategies (primary and selective) and define.
Outline the objectives/parameters of the question.

Main Body (1000-1500 words)

Identify which marketing strategies are relevant over the next 2 years and why?
What marketing strategy recommendations would you make to increase primary and/or selective demand? And why?

Summary and Conclusion (500 words)

Summarise your marketing strategy recommendations and your justification.

IMPORTANT ASSIGNMENT INFORMATION

1. Late Penalty: In fairness to other students, work submitted after the deadline will incur a penalty for lateness. Late assignments will carry a penalty of 5% for each day late. In the event of unusual circumstance e.g. serious illness, family bereavement, students should discuss waiver of the penalty with the course lecturer.
2. Word Count: Clear word count limits are stated for these assignments. Failure to adhere to these limits will incur a penalty of 2.5% for each 500 words over the limit.
3. “Banned” Products: There are a number of products and services that cannot be chosen for these assignments. These include any of the products or services discussed in the textbook (Gultinan Paul and Madden), the Strategic Marketing Management case study book, and the following products, cellphone providers, airline providers, energy drinks, large multi-national chains (Dell, KFC, McDonalds, etc) and gyms.
4. Referencing: Proper and accurate referencing is required in these assignments. Students are encouraged to use the lectures or tutorials for example, or by the lecturer/tutor concerned at a pre-arranged time and place. ‘SMIB Guidelines for Written Material and Referencing’ for information as to how to present, submit, organize and reference their work. These guidelines, including examples of appropriate essay, report, and academic research formats are contained in this course outline.
5. Returning Assignments: Where possible assignments will be returned to students in class (during lectures or tutorials for example), or by the lecturer/tutor concerned at a pre-arranged time and place. In accordance with University policy all uncollected assignments will be held by the SMIB office (RH 1121) for three months following the end of term, and then disposed of.

ACCESSING WEB RESOURCES

You will be able to access the course outline, course notes, case studies and other learning material (e.g. short problems, case studies, readings, exam questions) via Blackboard. The address is: <http://blackboard.vuw.ac.nz>. You will be asked for your SCS username and student ID. Click on the MARK 211 course heading under My Courses.

It is up to you to make sure that you check Blackboard on a regular basis. The lecturer or tutors cannot be held responsible if you do not check the notices or the various Discussion Boards frequently.

TERMS REQUIREMENTS

To obtain terms in MARK 211, students must:

1. Attend 6 out of the 8 scheduled tutorials.
2. Submit the Strategic Market Analysis Paper and the Marketing Strategy Paper on the due dates as outlined above.

Failure to meet terms requirements will mean that you will receive an ungraded "Fail" for the course, whether or not you choose to sit the final examination.

OVERALL PASS MARK

The overall pass mark for this course will be 50% of the total marks i.e. 50/100.

The University also requires that you achieve a minimum grade of 40% in the Registry exam.

TIMETABLE

<u>Week</u>	<u>Date</u>	<u>Topic</u>	<u>Reading</u>
Week 1	1 March	Course Introduction and Overview The scope of Marketing Management	
	3 March	The Marketing Planning Process Corporate, Strategic and Tactical Planning <i>Case: American Express (Corporate Planning)</i>	Chapters 1, 2
Week 2	8 March	Market Analysis	Chapter 3
	10 March	Market Analysis <i>Case: Icebreaker (Product Market Structure)</i>	Chapter 3
Week 3	15 March	Segmentation and Competitive Analysis	Chapter 4
	17 March	Segmentation and Competitive Analysis <i>Case: Macpac</i>	Chapter 4
Week 4	22 March	Market Measurement	Chapter 5
	24 March	Profitability and Productivity Analysis <i>Case: Dot Publishing (Profitability)</i>	Chapter 6
Week 5	29 March	Marketing Strategies and Positioning	Chapter 7
	31 March	Marketing Strategies and Positioning	Chapter 7
Week 6	5 April	New Product Development	Chapter 8
	7 April	Product Development Programs <i>Case: Wallace Crossley (Payback and NPV)</i>	Chapter 8
MID-TRIMESTER BREAK			

Week 7	26 April	Pricing Programs	Chapter 9
	28 April	Pricing Programs <i>Case: Healthy Spring Water</i>	Chapter 9
Week 8	3 May	Advertising Programs	Chapter 10
	5 May	Sales Promotions Programs <i>Case: Terry Tate and Presto</i>	Chapter 11
Week 9	10 May	Sales and Distribution Programs	Chapter 12
	12 May	Sales and Distribution Programs <i>Case: Right Hemisphere</i>	Chapter 13
Week 10	17 May	Coordination and Control	Chapter 14
	19 May	Coordination and Control <i>Case: Coke vs. Pepsi; Parcel and the Wall</i>	Chapter 15
Week 11	24 May	Marketing Planning in the Real World	
	26 May	Marketing Planning in the Real World	
Week 12	31 May	Course Overview AND Examination Guidelines	
	2 June	Question and Answer Session	

Important Notes:

1. In addition to reading the course textbook by Gultinan, Paul and Madden, you are **STRONGLY** recommended to read all extra cases and reading material distributed in class or posted on Blackboard. The better prepared you are for the lectures the more information and knowledge you will gain out of them – all of which will be relevant for the assignment, the final exam or both.
2. The weekly PowerPoint slides will be published for all lectures and will be available on Blackboard 48 hours prior to classes. Overhead transparencies will not be made available to students.

TUTORIAL PREPARATION MATERIAL

Tutorial 1

Week 3: Week Commencing 13 March 2006

Topic: Market Analysis: Chapter 3

Preparation Required: For the product or service you have chosen for the Strategic Marketing Analysis Paper, you will need to tackle the following:

- a) Define the relevant market for the product or service.
- b) Analyse primary and/or selective demand for the relevant market.

Tutorial 2

Week 4: Week Commencing 20 March 2006

Topic: Market Analysis (Continued)

Tutorial 3

Week 5: Week Commencing 27 March 2006

Topic: Segmentation and Competitor Analysis: Chapter 4

Preparation Required: For the same product or service, you will need to:

- a) Define market segments.
- b) Assess the competition.
- c) Identify potential target markets.

Tutorial 4

Week 6: Week Commencing 3 April 2006

a) **Topic: Market Measurement: Chapter 5**

Preparation Required: For the same product or service, you will need to:

- b) Estimate absolute and/or relative market potential.
- a) Attempt NPQ (where necessary) to evaluate these 'gaps'.

Tutorial 5

Week 7: Week Commencing 24 April 2006 – **FIRST ASSIGNMENT DUE**

Topic: Marketing Strategies and Positioning: Chapter 7

Preparation Required: In light of the material you have covered in previous weeks (strategic market analysis), you now need to think about marketing strategies for the product or service over the next 2 years. Specifically:

- a) Is the best opportunity to expand primary demand or selective demand? Why?
- b) What marketing strategy recommendations would you make to increase primary or selective demand? Why?

Tutorial 6

Week 8: Week Commencing 1 May 2006

Topic: Marketing Strategies and Positioning (Continued)

Tutorial 7

Week 9: Week Commencing 8 May 2006

Topic: Marketing Strategies and Positioning (Continued)

Tutorial 8

Week 10: Week Commencing 15 May 2006

Topic: A Look Ahead...

Preparation Required: Having now completed a situational analysis for a product or service of your choice it is time to become a Marketing Consultant. Given what you have learned in the course to this point pick one of the case studies in the Strategic Marketing Management Casebook (excluding Body Piercing), and critique its approach. This provides a crucial starting point for the revision of this course.

- a) For example, has the product market structure been drawn correctly, are the segments consistent, are there competitor tools that would have been more appropriate?
- b) Be prepared to defend your critique in tutorials.

Important Note:

Tutorials 1-5 address Assignment 1 - The Strategic Market Analysis Paper

Tutorials 6-8 address Assignment 2 - The Marketing Strategy Paper

FACULTY OF COMMERCE AND ADMINISTRATION OFFICES

Railway West Wing (RWW) - FCA Student Administration Office

The Student Administration Office is located on the ground and first floors of the Railway West Wing. The ground floor counter is the first point of contact for general enquiries and FCA forms. Student Administration Advisers are available to discuss course status and give further advice about FCA qualifications. To check for opening hours call the office on (04) 463 5376.

Easterfield (EA) - FCA/Law Kelburn Office

The Kelburn Campus Office for the Faculties of Commerce & Administration and Law is situated in the Easterfield Building - it includes the ground floor reception desk (EA005) and offices 125a to 131 (Level 1). The office is available for the following:

- Duty tutors for student contact and advice.
- Information concerning administrative and academic matters.
- FCA Student Administration forms (e.g. application for academic transcripts, requests for degree audit, COP requests).
- Examinations-related information during the examination period.

Check with the Student Administration Office for opening times (04) 463 5376.

GENERAL UNIVERSITY POLICIES AND STATUTES

Students should familiarise themselves with the University's policies and statutes, particularly those regarding assessment, course of study requirements, and formal academic grievance procedures.

STUDENT CONDUCT AND STAFF CONDUCT

The Statute on Student Conduct together with the Policy on Staff Conduct ensure that members of the University community are able to work, learn, study and participate in the academic and social aspects of the University's life in an atmosphere of safety and respect. The Statute on Student Conduct contains information on what conduct is prohibited and what steps can be taken if there is a complaint. For queries about complaint procedures under the Statute on Student Conduct, contact the Facilitator and Disputes Advisor. This Statute is available in the Faculty Student Administration Office or on the website at:

www.vuw.ac.nz/policy/StudentConduct. The policy on Staff Conduct can be found on the VUW website at: www.vuw.ac.nz/policy/StaffConduct.

ACADEMIC GRIEVANCES

If you have any academic problems with your course you should talk to the tutor or lecturer concerned or, if you are not satisfied with the result of that meeting, see the Head of School or the Associate Dean (Students) of your Faculty. Class representatives are available to assist you with this process. If, after trying the above channels, you are still unsatisfied, formal grievance procedures can be invoked. These are set out in the Academic Grievances Policy which is published on the VUW website: www.vuw.ac.nz/policy/AcademicGrievances.

PLAGIARISM AND ACADEMIC INTEGRITY

Academic integrity is about honesty – put simply it means **no cheating**. All members of the University community are responsible for upholding academic integrity, which means staff and students are expected to behave honestly, fairly and with respect for others at all times.

Plagiarism is a form of cheating which undermines academic integrity. Plagiarism is **prohibited** at Victoria.

The University defines plagiarism as follows:

Plagiarism is presenting someone else's work as if it were your own, whether you mean to or not.

'Someone else's work' means anything that is not your own idea, even if it is presented in your own style. It includes material from books, journals or any other printed source, the work of other students or staff, information from the Internet, software programmes and other electronic material, designs and ideas. It also includes the organization or structuring of any such material.

Plagiarism is not worth the risk.

Any enrolled student found guilty of plagiarism will be subject to disciplinary procedures under the Statute on Student Conduct (www.vuw.ac.nz/policy/studentconduct) and may be penalized severely. Consequences of being found guilty of plagiarism can include:

- an oral or written warning
- suspension from class or university
- cancellation of your mark for an assessment or a fail grade for the course.

Find out more about plagiarism and how to avoid it, on the University's website at: www.vuw.ac.nz/home/studying/plagiarism.html.

STUDENTS WITH DISABILITIES

The University has a policy of reasonable accommodation of the needs of students with disabilities. The policy aims to give students with disabilities an equal opportunity with all other students to demonstrate their abilities. If you have a disability, impairment or chronic medical condition (temporary, permanent or recurring) that may impact on your ability to participate, learn and/or achieve in lectures and tutorials or in meeting the course requirements, then please contact the Course Coordinator as early in the course as possible. Alternatively you may wish to approach a Student Adviser from Disability Support Services to confidentially discuss your individual needs and the options and support that are available. Disability Support Services are located on Level 1, Robert Stout Building, or phoning 463-6070, email: disability@vuw.ac.nz. The name of your School's Disability Liaison Person can be obtained from the Administrative Assistant or the School Prospectus.

Student Support

Staff at Victoria want students' learning experiences at the University to be positive. If your academic progress is causing you concern, please contact the relevant Course Co-ordinator, or Associate Dean who will either help you directly or put you in contact with someone who can.

The Student Services Group is also available to provide a variety of support and services. Find out more at www.vuw.ac.nz/st_services/ or email student-services@vuw.ac.nz.

VUWSA employs two Education Coordinators who deal with academic problems and provide support, advice and advocacy services, as well as organising class representatives and faculty delegates. The Education Office is located on the ground floor, Student Union Building, phone 463 6983 or 463 6984, email education@vuwsa.org.nz.

MANAAKI PIHIPIHINGA MAORI AND PACIFIC MENTORING PROGRAMME

- **What:** Academic Mentoring for Maori and Pacific students studying at all levels in the above faculties. Weekly sessions for an hour with a mentor to go over assignments and any questions from tutorials or lectures. Registered students can use the faculty's study rooms and computer suite at any time at Kelburn and Pipitea.
- Mature student and Post grad network

If you would like to register as a mentor or mentee please contact the coordinator.

Where:

Melissa Dunlop
Programme Coordinator
Room 109 D
14 Kelburn Parade: back courtyard
Ph: (04) 463 6015
Email: Maori-Pacific-Mentoring@vuw.ac.nz

PART A: SCHOOL OF MARKETING AND INTERNATIONAL BUSINESS GUIDELINES FOR WRITTEN MATERIAL

Page Layout

All written material submitted in SMIB courses must be typed using 12 pt. Font. Either Times Roman or Arial font may be used. Whichever is used, it must be used consistently throughout the document, including tables and figures. Two point five centimetre (one inch) margins should be used at the top, bottom, and both sides of the document. Use double spacing, or 1.5 spacing, between lines. Add an additional line space between paragraphs, OR indent the first line of each paragraph.

Referencing Style

All SMIB written documents must use the APA referencing style. The reference style is provided in at the end of this document.

- References should be placed **at the end** of the document in a separate section (*not as footnotes or endnotes*).
- **Every** source that is cited in the text **must** have the complete reference in the reference section. Conversely, every source appearing in the reference section **must** appear -- at least once -- in the text. Author's names must be spelled the same in the text and reference section. The dates given must be the same in the text and reference section.

Appendices

You may use appendices to place supplementary material, which does not directly relate to the text of your essay/report. If something is important then it should be included in your discussion proper. Reference must be made to the appropriate appendices in your text (i.e., refer Appendix A). A single appendix should be titled APPENDIX. Multiple appendices are titled APPENDIX A, APPENDIX B, etc. Appendices appear in the order that they are mentioned in the text of the essay/report, for example, the first appendix to be referred to will be Appendix A.

Tables and Figures

Tables and Figures should be inserted in the text of the document.

- A table is something that contains an array of numbers or text (such as a SWOT table). Use the MSWord table option to create a table, or create the table in Excel and insert it in the document. Other possibilities are to cut and paste tables from the output of other programs. For example, SPSS output is in the form of tables that may be cut and pasted into a document. Check for spelling in material you insert from other sources!
- A figure is something that contains graphical content. Typical content for a figure consists of graphs created in Excel, organisational diagrams created in Power Point, or graphs created by programs such as SPSS. Charts and graphs created by these programs may be cut and pasted into a document. Word cannot check spelling in graphical material.

- Each table or figure should be inserted below **two, centred lines of text**. The first line of text should identify the table or figure (Table 1 or Figure 3, for example). Below this line there should be a line describing what is in the table or figure (e.g., “GDP of New Zealand, 1988 – 2002,” or “Market Shares of Firms (2003).” The identification and explanation lines should separately be entered as text preceding the table or figure. The table or graph is inserted and centred below. (Including the two lines in a figure reduces the relative size of the figure and, furthermore, sizing the figure to fit the page will change the font size of the identification and title lines).
- If a table or figure is included in a document, then there **must** be text that refers to it! The text should refer to it by name (“As Table 1 shows...”). The text should also explain what the table or figure shows. Do **not** leave it to the reader to try to figure out why you included the table or figure in your document!
- Tables and figures should supplement and clarify the text, not completely duplicate it. Avoid repetitive figures (e.g., pie charts, histograms), which could be summarized more succinctly by one or two tables, or simply covered in the text.
- Sufficient information should be contained in the table or figure so that the reader can understand it without having to consult the text. Footnotes immediately underneath the table or figure should be used to explain all abbreviations and symbols used. Do not forget to give the source of your material with your table/figure.

Use of covers

It is **not** necessary to put plastic (or other types of covers) on assignments turned in *during* the semester. A simple cover sheet with a staple in the upper, left corner of the document will suffice. Your instructor will tell you whether major assignments turned in *at the end* of the semester should have covers (and if so the nature of the cover).

Organisation and Writing Style

A good way to start a written document is to make an outline of its structure, for example, using Word outline. That gives you a check on logical flow. You should be able to tell from the outline whether the paragraphs are in the proper order and whether one leads to the next in a logical fashion.

- Generally, the first sentence of the paragraph should cover the main point or purpose of the paragraph. If the paragraph has more than one purpose, try to break it into two or more paragraphs.
- Next in order are material, arguments, or evidence that support the main point.
- *Examples* that illustrate supporting material, arguments, or evidence are placed at the end of the paragraph.
- Regarding the structure of sentences, the noun and verb should occur as closely together as possible. (*The PLC is important. **Not:** The PLC, which has been around a long time, and has seen wide use, in many contexts, continents, industries, product categories, and so forth, is important.*)
- Place the material you want to emphasize at the stress position in the sentence. The stress position is at the end of a sentence. You want to emphasize **new material** typically. For example, assuming you have introduced the PLC, and the point you want to make is that it is important, you would have as a first sentence of a paragraph (*The PLC is important. **Not:** An important concept is the PLC.*)
- In the above illustration, when you start the paragraph with the sentence “*The PLC is important*” you have accomplished two things. First, you have made the point that the

purpose of the paragraph is to argue that the PLC is important. Second, the notion that it is important *is no longer new information*. Subsequent sentences should provide new information that supports that point.

- The next sentence, for example, might be: (*It is important because it explains why firms must develop new products; Or: It is important for three reasons. The first reason is: Or, It is important for many reasons. One important reason is*). Note that the stressed part of the previous sentence is no longer new and has been moved to the front of the current sentence. The new information in the current sentence is a reason for why the PLC is important. The reason is placed in the stress position.
- The same pattern applies to the following sentence. (The PLC is important. *It is important because it explains why firms must develop new products. New products must be developed because competitors enter the firm's markets, offerings become more homogeneous, prices decrease, and margins are reduced.*
- Avoid terms or usages that are or may be interpreted as denigrating to ethnic or other groups. Be particularly careful to use gender-neutral terms. For example, use plural pronouns (e.g., clients...they) rather than gender-specific pronouns (e.g., client...he).
- Using the first person is discouraged in academic writing. For example it is better to say "In the author's opinion....." rather than "In my opinion.....", or "the author believes...." rather than "I believe...". Alternatively, reword your sentence to avoid using these terms.

Footnotes

Footnotes should be used sparingly. Points that are important can usually be integrated into the text. Avoid footnotes or endnotes for referencing (see Referencing below).

Two final points:

- Proofread your document before turning in for marking. It **always** is best to let a few days pass between your last writing and your proofreading of a document.
- Use the spelling/grammar checker on your document before turning it in for making.

PART B: SMIB REFERENCING STYLE GUIDELINES FOR REFERENCING FOR ALL ASSIGNMENTS

Purpose

The effective use of a referencing system enables you to acknowledge the source of your ideas, to provide support for your arguments, to avoid plagiarism, and to allow your readers to consult original readings.

It is strongly recommended that you use the American Psychological Association (APA) style of referencing, a widely-used and well-documented style in the social sciences and management.

This brief introduction to referencing covers the basics of in-text referencing, reference lists and bibliographies.

American Psychological Association (APA) Style

The American Psychological Association (APA) style of referencing is widely used in the social sciences (including commerce). The manual for this style is held in the University Library (Publication manual of the American Psychological Association), or for the latest tips on citing electronic sources see the APA web page at <http://www.apastyle.org/elecref.html>.

In-text referencing system

When using the APA format, follow the author-date method of in-text citation. This means that the author's last name and the year of publication for the source should appear in the text, and a complete reference should appear in the reference list at the end of the paper.

This system replaces the use of endnotes or footnotes for references. You use brackets () in the text to supply the surname of the author(s), the year of publication, and, if a direct quote is used, give the page number. For example:

Correct referencing allows the reader to follow up interesting references (Jones, 1992).

Correct referencing gives what Jones has called 'an impression of competence' to a piece of academic writing (Jones, 1992, p. 35).

If a paper has only **one or two authors**, quote the name(s) in brackets as shown above, for example: (Smith & Jones, 1993).

When a paper has three to five authors, cite all authors surnames the first time. Subsequent citations only include the surname of the first author followed by et al. (not italicised and with a period after "al") and the year. For example an article authored by Smith, Brown and Jones would be cited in the text as (Smith, Brown & Jones, 1990) in the first instance and (Smith et al., 1990) in subsequent citations.

If the paper has **six or more authors**, state the first surname only followed by the words "et al.". For example a paper authored by Smith, Brown, Haley, LeBlanc, Morris and Jones would be listed in the text as (Smith et al., 1990).

If you have cited **two or more publications by the same author written in the same year**, these need to be differentiated in the text and in the reference list (or bibliography) by using lowercase letters following the date. For example, the first reference in the text to the author's 1993 work will be (Akoorie, 1993a). A second paper written by Akoorie in 1993 is cited later in the text as (Akoorie, 1993b).

If the reference has **no author** (or editor, company/organisation name) cite the first few words of the reference list entry (usually the title) and the year of publication in the text.

Include a page number if a direct quote is used, for example: (“Dairy industry...”, 1995, p. 13). Also see the section on ‘citing electronic references’, for references with no authors (see below).

If the reference is an **electronic reference**, *use the same method* as for other references, i.e. (Surname of author, year of publication). If there is no author (or editor, company/organisation name) is given cite the first few words of the reference list entry (usually the title of the document).

A similar study was done of students learning to format research papers (“Using APA”, 2001).

If the reference has **no author and no date**, use the first few words from the title, and the abbreviation n.d. (for “no date”). For example, (“Using APA”, n.d.).

If the reference is a **personal communication**, such as telephone conversations, interviews and various types of electronic communication such as e-mail, discussion group and bulletin board postings, these should be referenced in the text but *not included in the reference list*. This is because the reader is often unable to access the source of the information due to lack of information, publication etc. Citing personal communications in the text should use the following format: (Name, title/company, personal communication, day/month/year). For example:

(Don Brash, Reserve Bank of New Zealand, personal communication, 14 November, 1997).
(Tommy's Home Page, <http://www.waikato.ac.nz/personnel/tommy.html>, 4 June 1997).

Note: the in-text reference includes (at least) the home page title, home page address and date of access. An **e-mail message** should include the sender, sender's e-mail address, date, subject of message, recipient's e-mail address:

Day, Martha (MDAY@sage.uvm.edu). (30 July 1995). Review of film - *Bad Lieutenant*. E-mail to Xia Li (XLI@moose.uvm.edu).

At the end of your paper you then list details of each reference (except personal communications) in a reference list or bibliography.

Quotations

Quotations are used to support specific points you wish to make. They should readily fit with the idea you are discussing and should thus need no further explanation. Generally, two types of quotations are used - the short quotation (a few words of clarification) and long quotations (a full sentence or two that makes a specific point by itself).

A **short quotation** (fewer than 40 words) should be incorporated in the text and enclosed by double quotation marks. It may include whole sentences or part of a sentence. For instance:

The use of adequate referencing is "absolutely essential" for professional report-writing (Hughes, 1990, p. 456).

A **long quotation** (40 words or more) should be displayed in a free standing block (like this one!), double indented from the margins, without quotation marks. Spacing in long quotes is reduced to one line (single spacing). This paragraph is an example of a long quotation (Author, year, p. xx).

Make sure you cite the reference for the quotation, including the page number. This may take several forms, for example:

According to Jones (1998), “Students often had difficulty using APA style” (p. 199).

Preparing a reference list or bibliography

Your reference list or bibliography should appear at the end of your paper. It provides the information necessary for a reader to locate and retrieve any source you cite in the body of the paper.

Where in-text or cited references only are given at the end of an essay or report, the list is titled '**References**' or '**Reference List**'. Each source you cite in the paper must appear in your reference list; likewise, each entry in the reference list must be cited in your text.

A bibliography is generally a reading list - for instance, a list supplied with course material to show suggested readings. Sometimes students wish to include a bibliography in assignments, to acknowledge items that they have read, but that are not included as in-text references. A single list including both in-text references and other reading material is usually used for academic assignments, and is titled '**Bibliography**'. In other words, the bibliography includes **ALL references** to other material that you have gathered during your research, whether they are cited in your assignment or not. The format for a Bibliography is the same as for the Reference list.

List details of each reference at the end of your paper, listed in ALPHABETICAL order. Each entry begins with the author's name and the publication date, allowing the reader to find it easily. The reference supplies full publication information about the item, for example:

REFERENCES – An Example

- Holmes, T. H. & Rahe, R. H. (1967). The social readjustment rating scale. *Journal of Psychometric Research*, 11, 213-218.
- Jantsch, E. (1980). *The self-organising universe: Scientific and human implications of the emerging paradigm of evolution*. New York: Pergamon.
- Kim, Y.Y. (1985). Communication, information, and adaptation. In B. D. Ruben (Ed.), *Information and behaviour*, New Brunswick, NJ: Transaction Books, 32-34.
- Lum, J. (1982). Marginality and multiculturalism. In L. Samovar, B. R. Porter (Eds.), *Intercultural communication: A reader* (3rd ed.). Belmont, CA: Wadsworth.

Points to note when referencing

- The order and style used for authors' names (last name first, initials only).
 - The year of publication in brackets ().
 - That a full stop follows the date, followed by the title, then full stop again.
 - That the title of the book or journal (i.e. the publication) is either italicised or underlined. Only the first letter of the first word (and first word following a colon) is capitalised. [Proper Nouns are also capitalised, i.e. China, English].
 - The place of publication, followed by a colon.
 - That the name of the publisher comes last, followed by a full-stop;
 - And that all but the first line of each reference is indented (this is called a hanging indent, in MS Word under Format, paragraph)
- Furthermore,
- Do not use '**et. al.,**' in the reference list, all authors must be listed for each reference.
 - If there is **no author** (or editor, organisation/company) for your reference, move the title to the author position (before the date of publication). Example:
"Dairy industry haggles over future". (1995). *The Independent*, 11 August, 13.
Merriam-Webster's collegiate dictionary (10th ed.).(1993). Springfield, MA: Merriam Webster.

- If there are **two or more publications by the same author(s)**, order them by publication date, oldest to newest.
- If you have cited **two or more publications by the same author written in the same year**, these need to be differentiated in the text and in the reference list by using lowercase letters following the date. For example, the first and second references cited in the text will appear in the reference list as:

Akooie, M. (1993a). Patterns of foreign direct investment by large New Zealand firms. *International Business Review*, 2(2), 169-189.

Akooie, M. (1993b). Pragmatism and performance: International business in the development of two small economies: Singapore and New Zealand. In O. Yau and W. Shepherd (Eds.), *Proceedings of the Academy of International Business Southeast Asia Regional Conference*, June. Brisbane, 5-11.

- **If the reference is a chapter in an edited book, use the following format:**

Higgins, M. (1990). Social network analysis: Its implications for business and business communication. In F. Sligo (Ed.), *Business communication New Zealand perspectives*. Palmerston North: Software Technology, 168-179.

(Note that it is the book title that is either italicised or underlined, not the title of the article, and that the page numbers of the specific chapter are given at the end.)

- Where the reference is a **journal article** the publisher and place of publication are not included, for example:

Georgoff, D., & Murdick, R. (1986). Manager's guide to forecasting. *Harvard Business Review*, 64(1), 110-120.

(Note that the journal title is either italicised or underlined, and that capital letters are used as in the original journal title; page numbers are given without 'pp.'; volume and issue number are given as 64(1), instead of vol. 64, no. 1; a month or season is given with the year of publication if there is no volume or issue number.)

- If the reference is an **electronic reference**, use the following formats:

Article in an Internet Periodical

Author, A. A., & Author, B. B. (Date of publication). Title of article. *Title of journal, volume number*(issue number if available). Retrieved month day, year, from <http://Web address>.

Kenneth, I. A. (2000). A Buddhist response to the nature of human rights. *Journal of Buddhist Ethics*, 8(4). Retrieved February 20, 2001, from: <http://www.cac.psu.edu/jbe/twocont.html>

Nonperiodical Internet Document (e.g., a Web page or report)

Author, A. A., & Author, B. B. (Date of publication). *Title of article*. Retrieved month date, year, from <http://Web address>.

The Foundation for a Better World. (2000). Pollution and banana cream pie. In *Great chefs cook with chlorofluorocarbons and carbon monoxide* (Chap. 3). Retrieved July 13, 2001, from: <http://www.bamm.com/cream/pollution/bananas.htm> **NOTE:** When an Internet

document is more than one Web page, provide a URL that links to the home page or entry page for the document. Also, if there isn't a date available for the document use (n.d.) for no date.

Part of Nonperiodical Internet Document

Author, A. A., & Author, B. B. (Date of publication). Title of article. In *Title of book or larger document* (chapter or section number). Retrieved from <http://Web address>.

If **no author**/editor or company/organisation name is given move the title of the document to the author position (before the date of publication).

OTHER SOURCES

- **A Television Broadcast or Television Series**

Producer, P. P. (Producer). (Date of broadcast or copyright). *Title of broadcast* [Television broadcast or Television series]. City of origin: Studio or distributor.

Important, I.M. (Producer). (1990, November 1). *The Nightly News Hour*. [Television broadcast]. New York: Central Broadcasting Service.

Work discussed in a secondary source

Coltheart, M., Curtis, B., Atkins, P., & Haller, M. (1993). Models of reading aloud: Dual-route and parallel-distributed-processing approaches. *Psychological Review*, *100*, 589-608.

NOTE: Give the secondary source in the references list; in the text, name the original work, and give a citation for the secondary source. For example, if Seidenberg and McClelland's work is cited in Coltheart et. al., and you did not read the original work, list the Coltheart et. al., reference in the References. In the text, use the following citation:

In Seidenberg and McClelland's study (as cited in Coltheart, Curtis, Atkins, & Haller, 1993), ...

A government publication

National Institute of Mental Health. (1990). *Clinical training in serious mental illness* (DHHS Publication No. ADM 90-1679). Washington, DC: U.S. Government Printing Office.

A translated work and/or a republished work

Laplace, P. S. (1951). *A philosophical essay on probabilities* (F. W. Truscott & F. L. Emory, Trans.). New York: Dover. (Original work published 1814).

NOTE: When you cite this work in text, it should appear with both dates: Laplace (1814/1951).

A review of a book, film, television program, etc.

Baumeister, R. F. (1993). Exposing the self-knowledge myth [Review of the book *The self-knower: A hero under control*]. *Contemporary Psychology*, *38*, 466-467.

An entry in an encyclopaedia

Bergmann, P. G. (1993). Relativity. In *The new encyclopaedia Britannica* (Vol. 26, pp. 501-508). Chicago: Encyclopaedia Britannica.

Personal communications should not be included in your reference list.

Further details on writing style and referencing can be found in the APA's Publication Manual, available in the University Library.