EXPERIENTIAL LEARNING IN MARKETING: CREATING A STUDENT CLIENT CONSULTING ENGAGEMENT

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Full Paper
Experiential Track

ABSTRACT

This experiential learning in marketing opportunity involves learning through experience, using experiential learning by creating a student client consulting engagement. During the second week of class, teams of students are assigned a real-life marketing challenge facing a client. Each team of students is responsible for completing an analysis of the challenge and formulating recommendations to the client. The analysis and recommendations are presented to the client in both a business paper and oral presentation at the end of the semester. The objective is for students to understand and apply marketing concepts and practices presented in textbook readings and instructor-led teaching throughout their marketing coursework, to a real-life marketing challenge for a client. This experiential learning opportunity exposes students to the practical application of marketing based on a client consulting engagement in a senior-level undergraduate marketing capstone course.

THE OPPORTUNITY

This article presents an experiential learning approach by creating a client consulting engagement for students enrolled in an undergraduate senior level strategic marketing capstone course. Active student engagement is fostered through experiential learning. Experiential learning involves learning through experience via cognitive and affective involvement of the whole person (Hoover, 1974). It is the result of cognitive, affective, and behavioral engagement (Hoover & Whitehead, 1975). In addition, it is "the process whereby knowledge is created through the transformation of experience. Knowledge results from the combination of grasping and transforming experience" (Kolb, 1984). Experiential learning is an active form of learning that requires student engagement and leads to student learning outcomes (Burch, et al. 2014) that can be defined as developing personal understanding, knowledge, skills, and attitudes through the analysis of, and reflection on activity. Effective learning occurs when students are involved in the educational experience. Experiential learning through a client consulting engagement is an approach that actively involves students in the educational experience (Palia, 2021).

The instructor networks with professionals to identify a client with a specific marketing challenge. The instructor collaborates with the client to develop a project scope document that includes client contact information, instructor contact information, client background information, the marketing challenge, the student deliverable, key dates, and the grading rubric for a semester-long client consulting engagement. See Exhibit 1. The instructor introduces the client, the project scope document, and the deliverable to the students in an introductory meeting with the client within the first two weeks of the semester. Students self-select into teams of four to five individuals to complete their analysis and develop recommendations in support of the marketing challenge and the deliverable identified in the project scope document. Students gain first-hand experience applying and integrating marketing concepts in their analysis and development of client recommendations. Students use client provided and publicly available sources of data and information to complete their analysis and develop recommendations. Sources may include websites, 10Ks, annual reports, articles, media reports, press releases, social media, customer reviews, individual contacts, the U.S. Small Business Association (www.sba.gov), the U.S. Census Bureau (www.census.gov), and the U.S. Securities & Exchange Commission EDGAR website (www.sec.gov/investor/pubs/edgarguide.htm). Mid-semester, each student team provides an oral presentation update to the client on their progress, gaining feedback from the client on their analysis and preliminary recommendations. See Exhibit 2. The client feedback provides direction and guidance to each student team as they continue their work in preparing for the end-of-semester final client oral presentation and business paper.

Throughout the semester students experience, reflect, think, and act through the experiential learning cycle. See Figure 1. Students are challenged to discuss, debate, analyze and synthesize the application of what they have learned throughout their marketing coursework in completing their analysis and in developing final recommendations for the client marketing challenge deliverable explained in the project scope document.

Evidence suggests that experiential learning can produce significant learning gains and better student-learning outcomes (Berrett, 2012) in accordance with the higher levels of Bloom's taxonomy (Armstrong, 2010). Marketing student perceptions of learning activities are now structured by the degree to which the activities are enjoyable, challenging, and real-world. The recommendation is for marketing educators to pursue real-world, applied connections in learning activities to enhance the

FIGURE 1
THE EXPERIENTIAL LEARNING CYCLE
(SOURCE: INSTITUTE OF EXPERIENTIAL LEARNING)

The Experiential Learning Cycle is a four-step learning process that is applied multiple times throughout every interaction and experience: Experience – Reflect – Think – Act.

perceived effectiveness of learning activities (Karns, 2005). The experiential learning approach presented in this article is based upon the use of real-world, applied connections by students with the client.

MARKETING CURRICULUM OBJECTIVES

This experiential learning approach supports the attainment of curriculum objectives including the effect of external forces on marketing decisions; marketing strategies; marketing aspects of both business ethics and social responsibility; and global marketing.

THE EXPERIENTIAL LEARNING APPROACH

Students self-select into a team of four to five individuals (Carnegie Mellon University, 2015) during Week 2 of class, after the introductory meeting with the client to discuss the project scope document, marketing challenge and deliverable. Students will apply the marketing concepts and practices learned throughout their studies, in completing their analysis and developing client recommendations. Three important criteria in selecting a client are that the business challenge or opportunity is of interest to the student; data and information is available through the client or obtained through publicly available sources; and that the business challenge or opportunity will require students to apply marketing concepts and practices learned throughout their studies. When evaluating and selecting a client, the instructor should review to ensure these three criteria are met.

Specific learning outcomes from using the experiential learning approach may include the following:

- The contribution of marketing to society and organizations.
- Market segmentation and targeting.

- Positioning strategies and supporting marketing-mix selection.
- The buyer decision-making process and influencers of behavior.
- Marketing research and how it is used in decision-making.
- The differentiation between physical goods and services.
- Understanding how marketing decision-making must be coordinated with other functional areas in the organization.
- Adapting marketing recommendations to budget constraints.
- Projecting the financial effects of marketing activities.
- The strategic planning process.
- Application of strategies related to each of the elements of the marketing mix.
- The economic, social, and environmental concerns of marketing and sustainability.

A suggested textbook for the experiential learning approach is Experiential Learning: Experience as the Source of Learning and Development, 2nd Edition (Pearson FT Press, 2014). (Kolb, 2014). In preparation for their analysis and recommendations to be presented to the client in both a business paper and oral presentation at the end of the semester, students are to complete textbook reading assignments, review instructor lecture slides, and research and understand the marketing challenge presented by the client. This includes primary research such as interviewing the client, analyzing client provided data and information, developing, and fielding surveys, and analyzing relevant secondary data.

The instructor facilitates in-class discussion and activities that require students to apply, synthesize, analyze, or explain the application of the marketing concepts and practices being utilized in support of the analysis and recommendations to be presented to the client. The instructor is encouraged to discuss the application of the marketing concepts and practices to the marketing challenge based on personal experience, as appropriate.

Students consult with the instructor throughout the semester on the consulting engagement. The instructor schedules a mid-semester client update meeting between each student team and the client. The purpose of this meeting is for each student team to present their analysis to date and preliminary recommendations to the client, and gain feedback. The client provides feedback to the students and asks questions in support of the consulting engagement deliverable. Students are challenged to demonstrate the application of their learning of marketing concepts and practices in their analysis and preliminary recommendations. The instructor has the option of attending the mid-semester update with each student team and the client. Each student team uses the client feedback to modify their analysis and preliminary recommendations in preparation for the final business paper and oral presentation to the client at the end of the semester.

Instructor time requirements include identifying and selecting a client, defining the marketing challenge with the client, developing a project scope document, consulting with the student teams, scheduling all meeting dates with the client, participating in the mid-semester update with the client (optional), observing and grading the final oral presentation, textbook selection, lecture preparation, classroom instruction, the business paper submission and oral presentation grading, and facilitating in-class activities. Most often, the client will want to directly engage with the students throughout the semester in answering their questions. In a few instances, the client may ask the instructor to serve as the single point of contact between each student team and the client for facilitating student questions arising throughout the semester.

My experience with a traditional lecture approach using supporting textbook reading, online discussions, journaling, and videos were more theoretical and less dynamic. Students were not as engaged in the learning process. There was a lack of real-world application in the learning activities. Experiential learning through a client consulting engagement as explained in this article is much more applied and concrete, with the client consulting engagement as a real-world application. Students expand their knowledge and application of marketing concepts and practices. Karns' multidimensional scaling approach and regression analysis examining "Comparative Perceived Effectiveness Ratings Across Studies" provides a framework for comparing past and current approaches to learning. Karns concludes that applied/specific learning is more effective than theoretical/abstract learning. Furthermore, student preference for a learning activity is less important that the activity being applied/specific (Karns, 2005). The most effective learning takes place when students are involved in their educational experiences (AACSB, 2005). Experiential learning through a client consulting engagement is an active learning methodology and a pedagogical approach that challenges students through engagement and makes students responsible for meeting learning goals.

RESULTS

Student survey feedback evaluations from Fall 2015 through Spring 2022 *for the MKT 494 Strategic Marketing* capstone course at the author's university underscore the effectiveness of experiential learning through the client consulting engagement. See Exhibit 3. Questions 2, 3, and 4 are of particular importance because they characterize student understanding of an active and experiential learning environment for the client consulting engagement.

The oral presentation and business paper for the client consulting engagement are a summative assessment technique in the class that complements formative assessment techniques (Angelo, 1998). Formative and summative assessments work together enabling the instructor to provide student feedback, refine the instructional approach, and drive student learning and deeper knowledge.

LEARNING

Instructor selection of the client must meet the criteria of student interest in the marketing business challenge, availability of data and information, and the ability for students to apply the marketing concepts and processes studied. The same marketing business challenge is posed to each student team, creating an opportunity for each team to present different points of view to the client and the instructor.

Students work in teams of four to five individuals. Working as a team, students can explain ideas to each other, listen to alternative ideas and perspectives, reach consensus, coordinate efforts, resolve conflicts, and integrate the contributions of multiple team members. Reading assignments and research are completed independently of the team depending upon how the team assigns the work. If the class has forty or more students, the instructor may elect to structure larger teams of five to six individuals.

I recommend that each team submit a minimum twenty-page single-spaced business paper and prepare a minimum twenty-minute oral presentation using power point or another presentation software. The business paper is submitted to both the instructor and the client. The oral presentation is made to the instructor, client, and students. Each student on the team is to have an equitable role presenting in the oral presentation. The business paper and the oral presentation are to reflect the collective thinking of the team. Both the business paper and the oral presentation may include graphs, tables, or visuals. Experience indicates this is an appropriate page length and presentation time for both the business paper and the oral presentation, respectively, ensuring students thoroughly answer the marketing business challenge using professional business writing and oral presentation skills. The instructor collaborates with the client to define the marketing business challenge based on the marketing concepts and practices studied by the students and the needs of the client. The consulting engagement is recommended to be weighted at 40% of the final course grade. The business paper is weighted at 65% of the project grade and the oral presentation is weighted at 35% of the final project grade. Each student completes a Peer Evaluation on their team members and this score is then applied to calculate the final project grade for each student. See Exhibit 4.

ADAPTABILITY

I successfully used this experiential learning through client consulting engagements in two types of marketing courses over the last seven years; working with over thirty-five clients in a strategic marketing capstone course. Variables facilitating the adoption of experiential learning through client consulting engagements include the number of sections taught each semester, the decision to use one client or multiple clients when more than one section of a course is being taught during a semester, identifying the business challenge/opportunity for the students, and instructor preparedness.

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EXHIBIT 1
MKT 494 SPRING 2022 STRATEGIC MARKETING PROJECT SCOPE DOCUMENT

Client

- Client company name, address, phone number and website address

Contact

- Name, phone number and email of client representative(s)

Research Consultant

- Course number, course title, instructor name, instructor contact information and number of student teams

Client Background

- Client Vision, Mission, Value Proposition and three to four paragraph summary of the client business

Consulting Engagement Deliverables

- Description of the marketing challenge
- Specific Student Consulting Team Deliverable
  - See example below for an example
- Key dates for initial meeting with the client, mid-semester student team update, final business paper due date, and oral presentation due date and schedule

Example: Student Consulting Team Deliverable

- Develop a Business-to-Consumer (B2C) skin care product strategic marketing plan targeting men and women in the 18- to 40-year-old demographic with average gross income $75,000 and above. The objective is to drive awareness and purchase (revenue) of current skin care products among this demographic. Additional information regarding skin care products may be found at the client website. The strategic marketing plan is to include the following:
  - Create <u>at least 3</u> “Customer Avatars” for your each of your primary targeted customer “groups”. For example, one targeted customer group could be 30- to 40-year-old women. Each student team has the freedom to determine the targeted customer “groups”.
    - Definition of an “Customer Avatar”: A Customer Avatar (sometimes referred to as a buyer persona, marketing persona, or customer profile) is a representation of your ideal customer—the type of person you want to purchase your products or services. A company may identify multiple Customer Avatars if there are multiple groups of ideal customers that the product or service is targeting. Google “Customer Avatars” for examples of how the content and how to create one.
  - For each Customer Avatar develop the following:
    - Define the Value Proposition including product features, product usage benefits, etc.
    - Three examples of a Social Media Strategy and Tactics, Budget, and Implementation Plan including creative examples of the strategy and tactics and messaging content
    - Three examples of Non-Social Media Strategy and Tactics, Budget, and Implementation Plan including creative examples of the strategy and tactics and messaging content
    - Both an online and brick and mortar retail distribution strategy for selling skin care products
  - For marketing the skin care products to all Customer Avatars, develop:
    - A Customer Loyalty Program
    - Branding or (Re)branding recommendations for the Dermalastyl brand
  - Each student team will deliver a 20-minute oral presentation to the client in mid-April.
  - Each student team will submit a business paper to the client in mid-April

Grading Rubric

Exhibit 1 (Continued)
Client Consulting Engagement Grading Rubric

Team Project Rubric: 0 to 100 Points for Each Team Project – Business Paper				
Format/Organization (20%)	**100 – 90**	**89 – 80**	**79 - 70**	**0**
Title Page	Report includes title page with student names; student team name; organization name; course title and submission date.	All criteria are present but not in the correct order and/or lack visual interest.	Some of the criteria is missing.	No title page.
Format	Formatted as a business report with headings and sub-headings differentiated; use of paragraphs with no indents; charts, graphs and page numbers numbered correctly; references included in APA format.	Formatted as a business report with most headings and sub-headings differentiated; use of paragraphs with no indents; charts, graphs and page numbers numbered correctly; references included in APA format.	Formatted as a business report, and lacking one or more of the criteria; references included but not in APA format.	Did not follow instructions.
Grammar and Spelling	Error – free document.	Few errors.	Many errors.	Not readable
Analysis/Recommendations (80%)	**100 – 90**	**89 – 80**	**79 – 70**	**0**
Executive Summary	Description of what is in the Marketing Plan. Describes the main points and entices the reader. Written in clear paragraphs.	Description of what is in the Marketing Plan. Main points are lacking and/or vague.	Description of what is in the Marketing Plan. Main points are lacking. Not written in paragraphs.	Could not read and/or not included.
Company Description, Strategic Focus, Situational Analysis, Market – Product Focus	Company, its mission and competitive advantage clearly described. Detailed analysis of internal/external environment for organization and competitors. SWOT analysis completed. Clear objectives for the company, target market(s) clearly defined, points of differentiation explained. All based in research.	Lacking in detail and/or not a clear relationship among the data from one section to the next. Research not cited.	Poor analysis. Missing detail in some sections. Not clear if or how research was incorporated.	Could not read and/or some sections not included.
Marketing Program	A detailed description of the strategy recommendations in areas of product, price, channel management and promotion. Recommendations follow from analysis and assumptions, and clearly show how they will benefit the business within budgetary constraints.	Lacking in detail and/or not clear with the relationship of analysis to recommendations. Missing any of the marketing mix elements.	Unclear analysis. Missing more than one strategy in the marketing mix.	Could not read and/or section not included.
Financial Data and Projections – based upon data availability	Past Sales Revenue data used as a basis for future projections provided. Future projections include the next year, shown in an income statement. Impact on P&L assumptions are explained in detail. Break	Past or future revenues are not explained in detail and/or missing. Contribution Margin and/or Break-even analysis are not explained.	Financial data assumptions are not explained. Contribution Margin and/or Break-even are missing.	Could not read and/or section not included.

	even analysis and Contribution Margin calculated and explained.			
Implementation, Evaluation and Control	Detailed plan for how and when recommendations are implemented. Gantt or Excel chart included. Detailed recommendations for which metrics the organization should use and when.	Plan and/or recommendation lacking detail and/or vague. No chart for implementation.	Lacking detail in implementation, evaluation and control. No chart for implementation.	Could not read and/or section not included.

Team Project Rubric: 0 to 60 Points for Each Team Project – Oral Presentation			
Clearly Presents Ideas (50%)	**30 – 20**	**19 – 11**	**10 – 0**
Organization	Logical Flow. Purpose & support information easily understood.	Some incidences of lack of logical flow.	Inadequate or illogical flow and/or no discernable purpose.
Content	Presented material directly and completely in an exceptional manner. Presented relevant and interesting topics. Demonstrated thorough understanding of topic.	Presented material in a reasonable manner. Relevant topics presented, but not in an interesting way.	Material presented was neither relevant nor interesting. Lacked basic understanding of the topic.
Professional Delivery and Professional Materials (50%)	**30 – 20 (Exceed Expectations)**	**19 – 11 (Meets Expectations)**	**10 – 0 (Below Expectations)**
Delivery	Exhibited high level of enthusiasm and confidence. Responded fully and accurately to questions. Generated audience interest and interaction.	Exhibited uneven levels of enthusiasm and confidence. Some questions were answered more effectively than others.	Exhibited extremely low level of enthusiasm and confidence. Unable to effectively answer questions.
Projection	Pace, volume and enunciation enhanced the presentation.	Pace, volume and enunciation were acceptable but did not enhance the presentation.	Projection consistently detracted from the presentation. (E.g., Speech was too slow/fast, could not be heard, and used fillers such as “uhm” or “like”, incorrect pronunciation).
Non – verbal	Eye contact, gestures and movement were used effectively.	Eye contact, gestures and movement occasionally distracted from the presentation.	Non – verbal consistently detracted from presentation (E.g., read from notes, monitor or screen; lack of eye contact; no or excessive movement; stood behind podium or in front of screen).
Technology	Visuals were clear and professional, reinforcing the presentation. There were no spelling or grammatical errors.	Visuals used a distracting slide design (E.g., template, font, clip art). There was at least one spelling or grammatical error.	Visuals were unclear, unattractive and/or unprofessional. Did not support the presentation and contained several spelling and/or grammatical errors.
Appearance	Highly professional attire. All members professionally dressed.	Acceptable professional attire.	Unprofessional attire.

EXHIBIT 2

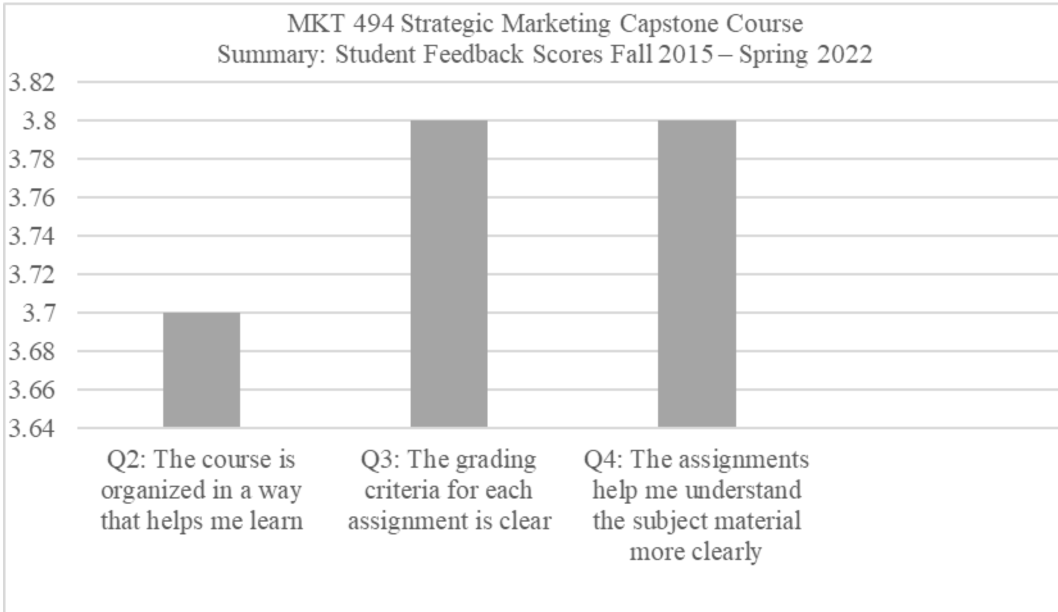
Client Mid-Semester Update

- The objective is for the client to provide feedback to each student team on their work-in-progress on the marketing challenge deliverable. Each student team is responsible for presenting to the client and gaining feedback.
- Student preparation for the Mid-semester update:
  - Develop a documented 20-minute project update using power point or other visual software.
    - Explain your analysis to date and any preliminary recommendations.
    - Ask insightful questions of the client that will support further development of recommendations and encourage client feedback and discussion on your work.
    - Provide a hard-copy and soft-copy of your update to the client that is well-written, professional in appearance and error-free.
      - Dress business professional.
  - Be professional and articulate in presenting to the client.
  - Listen carefully to client feedback and take notes.
  - Ask follow-up questions of the client, based upon your discussion.
  - Ask client for additional data and information as/if needed to support development of your recommendations.
  - Manage your time wisely.
  - Confirm with the client how to contact them should you have follow-up questions.
- Dress is business professional.
- Be professional and articulate in presenting to the client, listening carefully and taking notes on client feedback
- Ask follow-up questions of the client based upon the discussion.
- Ask client for additional direction, data, and information as needed to support development of your recommendations.
- Manage your time wisely.
- Confirms with the client how to contact them should you have follow-up questions.
- Mid-Semester Update Evaluation
  - The <u>client</u> will use the following criteria in providing feedback to each student team:
    - Meeting starts on time with all team members present.
    - All client representatives and team members have a hard copy of the update.
    - Discussion is professional. Team members are prepared for the discussion.
    - Content of discussion is thoughtful and demonstrates strong progress towards final recommendations based upon thoughtful recommendations, insightful questions, attention to detail and overall progress.

EXHIBIT 3

Student Course Evaluation Summary

MKT 494 Strategic Marketing Capstone– Fall 2015 through Spring 2022



- Feedback Scores based upon a 4.0 scale
- 653 student responses for the period Fall 2015 – Spring 2022 (7 Years)
- 653 student responses equate to a 78.19% course evaluation response rate
- 20 different client consulting engagements
    - Selected Student Feedback Verbatims. Note: 80% of the verbatims in response to the open-ended questions “What did you like most about this course?” and “The assignment that most contributed to my learning is…” cited the client consulting engagement.
    - “The client project contributed most to my learning. Using real clients gives students hands-on experience that contributes to their careers and learning. It was a hard project but the pay-off was extremely rewarding. The instructor motivates me to learn.”
    - “The strategic marketing project was hands-down the most real-life experience I had in college. It allowed me to gain insight into ‘real-world’ marketing and apply what I’ve learned in the classroom.”
    - “The term project was the best learning experience. It helped my teammates and I to work very diligently so that we could deliver an outstanding presentation to our client. We did not want to disappoint the instructor or our client, and because of that, we were all on this as a team!”

EXHIBIT 4

Peer Evaluation Form

Team Project Peer Evaluation Form (*10 points deducted from individual student final project grade for no/ late/incomplete form*) Please rate the performance of each member of your team, excluding yourself, regarding his/her contribution to this project on a scale of 0 to 100 using the following criteria. Rate each member candidly. Copy & paste, and submit this completed form in Bblearn by 8AM of the day of your presentation.

Full Name of Evaluator: ___________________ Your Team Name/Number: __________________

Criteria	Criteria Description
Cooperation and ability to work with the group	Attendance at meetings, contribution to meetings, carrying out of designated tasks and dealing with problems.
Communication	Effectiveness in meetings, clarity of work submitted to the group, communication between meetings and providing feedback.
Enthusiasm	Motivation, creativity, and initiative during the project.
Dependability	Consistency in involvement. Meets due dates, commitments, and deadlines.
Organization	Skills in self-organization and the ability to organize others. Organizes his/her own work. Planning, setting targets and establishing ground rules to meet commitments.
Amount of Effort	Effort put forward by the team member during the project to complete it.
Intellectual Contributions to the project	Offers insights based on critical thinking and reflecting that demonstrate careful studying of course content. Moves thinking forward on the project.
Team Member Evaluated: 1. Full Name ___________________________ 2. Full Name ___________________________ 3. Full Name ___________________________ 4. Full Name ___________________________	Performance Score for this Project (0 – 100) 1. Score ___________ 2. Score ___________ 3. Score ___________ 4. Score ___________

Note: You must provide written justification below for any peer evaluation that is below 70 or above 90. Your evaluations have impact on your team members so please be diligent. Individual Grade Calculation: Example - if your Team Project received 95/100 and your Peer Evaluation Score is 90/100, your grade for this Team Project would be calculated as (95/100) x (90/100) = .95 x .90 = 85.5. If no team member has an average peer evaluation score of 100/100, the highest average will be raised to 100/100 and the remaining scores will be adjusted proportionately.

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