

**THE EXTENDED LIVE CASE APPROACH
TO TEACHING MARKETING RESEARCH**

Alvin C. Burns
Louisiana State University

INTRODUCTION

Experientials and games teaching marketing principles and concepts appear to be enjoying a surge of enthusiasm at present. In addition to those presentations, demonstrations, and ideas at ABSEL conferences, there are at least three concrete evidences of this growing trend. One that comes to mind is the conference and published proceedings of the 1976 Mid-Atlantic Marketing Association with the theme "Experiential Learning in Marketing Education" (1976). Another is the more widely- published Experiential Exercises in Marketing by Woodside, Lewison, and DeLozier which was introduced at the 1977 AMA Educator's Conference. Finally, there is the soon-to-be- published Marketing In Action: An Experiential Approach by Peterson, Stanton, and Whately (1977). When one considers these developments along with the computer games and exercises already available to the potential user, it is apparent that considerable opportunity for the "learning by experience" approach exists in marketing.

GAMES AND EXPERIENTIALS IN MARKETING RESEARCH

While a growing number of games and experiential exercises is apparent across the several subfunctions within marketing, it appears that the marketing research area is lagging behind if one has faith in the following convenience sample results. Of the five marketing games and experientials presented at the 1977 ABSEL Conference, none pertained to marketing research; of the six presented in 1976, two dealt with marketing research; of those presented in 1975, only one dealt with marketing research. Three in three years is not exactly break-neck speed; furthermore, all three are computer based. Two are highly specialized In that Burns' MAILIT (1976) applies only to mail survey strategies and Gentry, Reutzel, and Burns' BAYES (1975) applies only to Bayesian sample size determination. Stanton's RAB (1976) has a broader approach which permits students to access a data bank generator and perform statistical analysis on this data.

Certainly all three simulations are useful and serve their users satisfactorily given the purposes for which they were designed. It appears, however, that ample opportunity exists for a more comprehensive and less computer-reliant approach. It is the primary purpose of this paper to describe a "live case" experiential method the author has employed in the teaching of his marketing research classes and which he believes eventuates greater learning of marketing research methods and skills.

**OVERVIEW AND OBJECTIVES OF THE “LIVE CASE”
IN MARKETING RESEARCH**

In a nutshell, the live case approach as applied by the author to his undergraduate marketing course involves the use of three- or four-person student teams who work for a business sponsor and execute a marketing research survey over the course. The responsibility begins with an initial meeting to ascertain the sponsor's information needs and progresses through design of the research methodology and data analysis to completion of a written report. The effort constitutes roughly one-quarter of student's effort and is the focal topic throughout about one-third of the course.

The objectives of this approach to the teaching of marketing research survey methodology are envisioned by the author as follows:

1. As with other experientials, the live survey approach overcomes the sterility and one-way delivery of course material often necessitated by the nature of marketing research.
2. Provision of a direct and immediate use of skills and methods presented in class affords students with tangible reasons for learning the materials.
3. The presence of a third party (i.e., the sponsor of the team's project) supplies intrinsic motivation to learn and apply marketing research techniques and skills.
4. Actual field experience acquaints students with practical problems and solutions to these problems which are much more difficult to present with computer simulation, case studies or in-class exercises.
5. By staying with a project from start to finish, students gain an appreciation for the flow of activities and contingent events in the marketing research survey process.

**DESCRIPTION OF THE LIVE CASE APPROACH
IN MARKETING RESEARCH**

The flow of events and topics presented in Figure 1 summarizes the live case approach as it is incorporated by the author. Essentially, the marketing research course topics are presented in the logical order by which they are performed in an actual marketing survey. After classroom coverage and reading assignments on each topic in general, students perform more specific individual written case analyses. Once these are completed and students are provided feedback on their performances, the team undertakes that phase of the team research project. Thus, for the majority of the stages in the marketing survey research process, each student receives a staggered triple dose-classroom

Exploring Experiential Learning: Simulations and Experiential Exercises, Volume 5, 1978

and reading; case experience; and team project. A description of the treatment of each phase follows:

1. Orientation and Introduction. To develop enthusiasm for the projects, much of the first day of class is devoted to a presentation of one of last semester's team projects. Usually a project done for a more well-known local business is described from the beginning meeting with the sponsor to the actual results of the survey. Going over the various phases in the survey acts as a handy course overview.

FIGURE 1

ACTIVITIES FLOW FOR THE LIVE CASE IN MARKETING RESEARCH

<u>Classroom Coverage</u>	<u>Individual Assignments</u>	<u>Live Case Survey Phase</u>
Orientation and Introduction		
Problem Definition		
Data Collection Methods	Problem Definition Case	
Questionnaire Design		
Questionnaire Design	Data Collection Method Case	Meeting with Sponsors Formulation of Objectives
Sampling Basics	Questionnaire Design Case	Determine Data Collection Method
Sample Design		Questionnaire Design
Field Collection Problems	Sample Design Case	
Data Analysis: Computer Orientation		Sample Design
Data Analysis: Description and Association	Data Analysis Case	Data Collection
Data Analysis: Prediction		Data Coding Data Key punching
The Research Report		Report Rough Draft
		Final Draft and Presentation

Exploring Experiential Learning: Simulations and Experiential Exercises, Volume 5, 1978

2. Problem Definition and Research Objectives. After about one and one-half weeks of introductory topics, the course swings into the marketing survey process in the following manner.

a. Classroom. (Third week) Class presentation begins with an overview of the complete marketing research process, a discussion of the researcher-decisionmaker relationship, and specifics with respect to problem definition. With conceptual frameworks and through the use of examples, students are taught how to separate symptoms from causes and how to differentiate subproblems from major problems. Delineation of problems leads directly into formulation of research objectives.

b. Individual Assignments. (Fourth week) A case analysis concerning problem definition and specification of research objectives is assigned as an individual written report.

c. Team Meetings with Sponsors. (Fifth week) Students form their own three- or four-person teams during the third and fourth weeks. By the fifth week, the Instructor has assembled a list of prospective sponsors and lists them to the class. Each team submits a day-by-day time schedule of those periods when all members are free for a one-hour meeting. Each team also indicates its first, second and third preferences for desired sponsor. The Instructor then contacts the sponsors and sets up meetings on campus.

The initial meetings are intended to determine the sponsor's problem and to map out the basic survey methodology necessary to collect information to satisfy the research objectives. As an introduction to his problem, the sponsor is requested to outline the background of his business, the recent history of the situation as he sees it, and any research or information he has which might shed light on the problem or its dimensions. In the case of a sponsor who has several diverse problems or one who has only a vague concept of the problem, the Instructor probes and directs the conversation to ensure that the team will have a concrete research task by the end of the meeting. The range of preparedness of sponsors is considerable: most are reasonably specific, but some are so imprecise as to say that they do not know the problem other than a few of the symptoms. Still others have even gone so far as to come to the meeting with a rough draft of the questionnaire.

3. Data Collection Methods. The next phase of the marketing research process to be treated is a discussion of the several data collection methods used by marketing researchers.

a. Classroom. (Fourth week) Class presentation and assigned reading covers the various methods of observation and survey. Topics include: unobtrusive, contrived, mechanical, and indirect observation, focus groups, projective techniques, personal interviews, telephone surveys, mail surveys, and self-administered questionnaires. Advantages, disadvantages, and special considerations are related.

b. Individual Assignments. (Sixth week) A case analysis concerning the choice of a particular data collection method is assigned as an individual written report.

Exploring Experiential Learning: Simulations and Experiential Exercises, Volume 5, 1978

c. Live Case. (Seventh week) The method of data collection is often determined at the initial meeting with the sponsor; however, in this phase of their projects, teams are required to submit statements of the research problem, research objectives, and the method of data collection in formalized format.

4. Questionnaire Design. Questionnaire design is treated in considerable depth and with liberal examples due to its importance in the team's project.

a. Classroom. (Fifth and Sixth weeks) General questionnaire construction procedure is presented after a session on scales and scaling. The Instructor uses visual aids and handouts to present the various question types: open-ended, dichotomous, multiple choice and answer, semantic differential, Likert-like questions, Gutman, Stapel, etc. Examples of previous team project questionnaires are brought into the classroom for discussion.

b. Individual Assignments (Seventh week) A case concerning the design of a questionnaire is assigned on an individual basis. If the opportunity arises, a "live" questionnaire is used. For example, in the fall, 1977 semester, students designed a questionnaire for the High School Relations Office after a presentation to the class of their basic problem by one of their staff.

c. Live Case. (Eighth week) The team continues in its live case with the design of the survey questionnaire. Each team's situation is, of course, unique, and two or three iterations are customarily required before the questionnaire is satisfactory. This phase of the live project is often the most traumatic for the team given that it is usually the first time when they are required to work together for an extended period with a specific result in mind. There is also a considerable shock when they receive the Instructor's comments of their first attempt. Eventually, however, the team comes to appreciate the necessity of a good questionnaire and the difficulty in designing a good questionnaire.

5. Sample Basics and Design. Students are next acquainted with survey sampling techniques with special emphasis on sample representativeness.

a. Classroom. (Seventh and Eighth weeks) Assigned reading and class presentation covers sample size determination, probability and nonprobability sampling methods. Whenever possible, the Instructor brings examples of team or other research studies to liven up the discussion with actual circumstances and sample plans.

b. Individual Assignments. (Ninth week) A case concerning the design of a survey sample and determination of the proper sample size is assigned as an individual written report.

c. Live Case. (Ninth week) Each team designs its sample plan based on its definition of the population under study and the objectives of the project. Time and financial constraints often necessitate the use of samples which are not as