



MARK 7397: Customer Insights, Spring 2023

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Mondays 6 to 9 PM, section 25276 (F2F, 118 MH)

Mondays 6 to 9 PM, section 25277 (Synch Online)

Goals:

The primary aim of this course is to provide conceptual grounding and hands-on experience to help you understand the world of the consumers, describe consumer personas and map their journey to help inform value-maximizing marketing strategies of both for-profit and not-for-profit entities.

Brief Course Description

Institutions engage in marketing activities to trigger exchanges. The counterparty to the exchange is the customer. To successfully engineer exchanges, it is imperative that the marketer understands customers' journey as it relates to the marketplace.

To this end, we will study a variety of phenomena including preferences, judgments, attitudes, choices, and behaviors regarding goods and services that punctuate people's daily lives. Specifically, we will study how these phenomena relate to marketing activities by the firm. We will also take a brief introduction to some qualitative and quantitative methods used for generating insights about consumers.

While we will encounter various concepts as part of this course, the emphasis will be on applying the said concepts. This will be done through a "Consumer Insights Project".

Materials:

Links for readings for the course will be made available in Blackboard® on an on-going basis. Links to some of the readings is provided toward the end of this syllabus. There are no materials to be purchased at this time (such as textbooks).

Course Sections and Format

This course is offered in two formats each with a distinct section number. You have to attend the course in the format you have officially enrolled. Section 25276 meets face-to-face but has some sessions online (both synchronous and asynchronous). Section 25277 meets synchronous online but has some sessions asynchronous online.

Grading

Your course grade will come from four components, details below:

1. Post-class Insights (PCI) + Peer Assessment	25 points
2. In-class participation	10 points
3. Consumer insights project	35 points
4. Exam (online, end of semester)	30 points
Total	100 Points

Details of Grade Components

- Post-class Insights (PCI) + Peer Assessment – 25 points
 - See Appendix B in this syllabus for more details.
 - The PCI is a weekly assignment done individually.
 - There are two phases each week – submission and peer evaluation.
 - The link for the PCI Assignment will be available on BlackBoard®.
 - Both submission and peer-evaluation are completed using the same assignment link. The only difference is the time frame and what you do.
 - Submission Phase:
 - Generate two major conceptual insights that you either contributed or took-away from the class.
 - The submission phase is open from 9 PM Monday (the day of class), and will close 11.59 PM, Thursday.
 - If you don't submit your insights during this window, you will not be able to do peer evaluation, and you will miss the points for the week.
 - Peer Evaluation:
 - When you click on the same assignment, you will now see 3 assignments from others in your class.
 - You have to provide both a numerical and written evaluation for each insight from the three peers.
 - The peer-evaluation phase will open Friday midnight (immediately after the submission window closes) and close at 11.59 PM Sunday.
 - The peer-assessment rubric is provided at the end of this syllabus.
 - PCI assignment can be submitted only if you are present for class. If you are absent for the class, you should not submit an PCI. If a PCI submitted and accidentally graded for a class you are absent, it will automatically convert to a zero when such absence is noted.
 - There is no making up of missed in-class participations or PCI assignments.
 - Each PCI will be based out of 10 points, and the total of all PCIs will be converted to a base of 25.
- In-class Participation (10 points):
 - This is a subjective grade based on my assessment of how you participate.
 - Participation can come in many forms. You can bring up questions, answer questions, bring up interesting examples, agree (or disagree) and amplify/synthesize others' points including that of the instructor. As a general rule, good participation generates a sustained discussion on the point you bring along. The quality of the contributions matters more than quantity.
- Customer Insights Project (Group, out-of-class) – 35 points
 - This project is a 4-week (approximate) group activity in which students in groups of 4 (or 5) will generate insights about consumers for a chosen product/service. Essentially, this will involve generating consumer personas, conducting marketing research, developing customer journey maps, and generating market strategy elements for the chosen product. More details will be provided in the class on an on-going basis.
- Exam (Individual) – 30 points

- The final exam is closed-notes, and will feature conceptual and application questions in multiple-choice format.

Please note that some components (PCI, assessment of participation, and consumer insights project) involve a subjective judgment on my part and that of the grading team (including peer assessments). I will be monitoring myself and the peer-evaluations to make sure that the judgments are well-grounded. However, do realize that this is subjective. If this is something you are uncomfortable with, or you “do not like to participate” in class, then you should find an alternative to taking this class. Sometimes, someone with fewer comments may get more points than someone who talks a lot. What matters is the insight that furthers the discussion, not just share-of-voice.

Tentative Course Schedule:

Date	Session	Format	Topic/Agenda
30-Jan-23	1	Asynchronous	Field work: Grocery Store Shadowing Exercise (See Appendix A in this syllabus)
6-Feb-23	2	F2F/SynchOnline	Short Presentation of Field Work Marketing Strategy and Customer Insights
13-Feb-23	3	F2F/SynchOnline	Consumption, Consumers, Customers, Stakeholders, Perspectives
20-Feb-23	4	F2F/SynchOnline	Consumption, Consumers, Customers, Stakeholders, Perspectives (continued) Consumer Decision Process – AIDA Model
27-Feb-23	5	F2F/SynchOnline	Segmentation and Consumer Personas
6-Mar-23	6	F2F/SynchOnline	Qualitative and Quantitative Research Methods
13-Mar-23		Spring Break	
20-Mar-23	7	F2F/SynchOnline	Qualitative and Quantitative Research Methods (continued)
27-Mar-23	8	F2F/SynchOnline	Customer Journey Maps
3-Apr-23	9	F2F/SynchOnline	Attitudes/Affect/Cognition 1
10-Apr-23	10	F2F/SynchOnline	Attitudes/Affect/Cognition 2
17-Apr-23	11	F2F/SynchOnline	Decision-making and Behavior
24-Apr-23	12	F2F/SynchOnline	Decision-making and Behavior
1-May-23	13	F2F/SynchOnline	Consumer Insights Project Presentations

Note regarding the Course Schedule: Session 2 through 12, submit post-class insights assignment by Thursday, 11.59 PM, following the day of the class, and complete the peer-review of others’ submissions by Sunday, 11.59 PM. See **Appendix B** for details on submitting and assessing insights.

Also note that this is a tentative schedule. This is expected to be a discussion-heavy class, and as a result there is a good chance that the topics will move around a bit. Do note that some of the face-to-face class sessions may be switched to synchronous/asynchronous online meetings. We will make up one lost session after consultation with the administration and subject to mutual convenience.

Error Correction and Make-up of Missed Assignments

I will rectify any errors in grading that arise from objective and documented situations, e.g., faulty arithmetic or assignment you completed in time but not given credit for. As a rule, make up exams or assignments are not possible unless they meet university criteria.

Slide-decks from Class

I may not post some or all of the slides online will be blank/missing prior to the class. This is intentional to encourage greater discussion. You will have access to the slide-deck shortly after the class.

Converting Points to Letter Grades

- Each grade component will be converted to the appropriate base, and then added to yield the total points. The following table will be applied for converting the total points (base 100) to letter grade. The instructor reserves the right to change the cutoffs.

93 and above	A	74 and above but less than 77	C
90 and above but less than 93	A-	70 and above but less than 74	C-
87 and above but less than 90	B+	67 and above but less than 70	D+
84 and above but less than 87	B	64 and above but less than 67	D
80 and above but less than 84	B-	60 and above but less than 64	D-
77 and above but less than 80	C+	Less than 60	F

Readings (will be updated):

1. BCG Global. "Customer Insights." Accessed January 14, 2023. <https://www.bcg.com/capabilities/customer-insights/overview>.
2. Hackett, Paul M. W., Jessica B. Schwarzenbach, and Uta Maria Jürgens. *Consumer Psychology: A Study Guide to Qualitative Research Methods*. Verlag Barbara Budrich, 2016. <https://doi.org/10.3224/84740772>.
3. Maslow, A. H. "A Theory of Human Motivation." *Psychological Review* 50 (1943): 370–96. <https://doi.org/10.1037/h0054346>. (requires cougarnet access via info.lib.uh.edu)
4. "The Consumer Decision Journey | McKinsey." Accessed January 8, 2023. <https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights/the-consumer-decision-journey>.

Additional Information from the University of Houston

COVID-19 Information

Students are encouraged to visit the University's [COVID-19](#) website for important information including diagnosis and symptom protocols, testing, vaccine information, and post-exposure guidance. Please check the website throughout the semester for updates. Consult the (select: [Undergraduate Excused Absence Policy](#) or [Graduate Excused Absence Policy](#)) for information regarding excused absences due to medical reasons.

Reasonable Academic Adjustments/Auxiliary Aids

The University of Houston complies with Section 504 of the Rehabilitation Act of 1973 and the Americans with Disabilities Act of 1990, pertaining to the provision of reasonable academic adjustments/auxiliary aids for disabled students. In accordance with Section 504 and ADA guidelines, UH strives to provide reasonable academic adjustments/auxiliary aids to students who request and require them. If you believe that you have a disability requiring an academic adjustments/auxiliary aid, please contact [the Justin Dart Jr. Student Accessibility Center](#) (formerly the Justin Dart, Jr. Center for Students with DisABILITIES).

Excused Absence Policy

Regular class attendance, participation, and engagement in coursework are important contributors to student success. Absences may be excused as provided in the University of Houston [Undergraduate Excused Absence Policy](#) and [Graduate Excused Absence Policy](#) for reasons including: medical illness of student or close relative, death of a close family member, legal or government proceeding that a student is obligated to attend, recognized professional and educational activities where the student is presenting, and University-sponsored activity or athletic competition. Under these policies, students with excused absences will be provided with an opportunity to make up any quiz, exam or other work that contributes to the course grade or a satisfactory alternative. Please read the full policy for details regarding reasons for excused absences, the approval process, and extended absences. Additional policies address absences related to [military service](#), [religious holy days](#), [pregnancy and related conditions](#), and [disability](#).

Recording of Class

Students may not record all or part of class, livestream all or part of class, or make/distribute screen captures, without advanced written consent of the instructor. If you have or think you may have a disability such that you need to record class-related activities, please contact the [Justin Dart, Jr. Student Accessibility Center](#). If you have an accommodation to record class-related activities, those recordings may not be shared with any other student, whether in this course or not, or with any other person or on any other platform. Classes may be recorded by the instructor. Students may use instructor's recordings for their own studying and notetaking. Instructor's recordings are not authorized to be shared with *anyone* without the prior written approval of the instructor. Failure to comply with requirements regarding recordings will result in a disciplinary referral to the Dean of Students Office and may result in disciplinary action.

Resources for Online Learning

The University of Houston is committed to student success, and provides information to optimize the online learning experience through our [Power-On](#) website. Please visit this website for a comprehensive set of resources, tools, and tips including: obtaining access to the internet,

AccessUH, Blackboard, and Canvas; using your smartphone as a webcam; and downloading Microsoft Office 365 at no cost. For questions or assistance contact UHOnline@uh.edu.

UH Email

Please check and use your CougarNet email for communications related to this course. To access this email, [login](#) to your Microsoft 365 account with your CougarNet credentials.

Webcams

Access to a webcam is required for students participating remotely in this course. Webcams must be turned on (*state when webcams are required to be on and the academic basis for requiring them to be on*). (Example: *Webcams must be turned on during exams to ensure the academic integrity of exam administration.*)

Academic Honesty Policy

High ethical standards are critical to the integrity of any institution, and bear directly on the ultimate value of conferred degrees. All UH community members are expected to contribute to an atmosphere of the highest possible ethical standards. Maintaining such an atmosphere requires that any instances of academic dishonesty be recognized and addressed. The [UH Academic Honesty Policy](#) is designed to handle those instances with fairness to all parties involved: the students, the instructors, and the University itself. All students and faculty of the University of Houston are responsible for being familiar with this policy.

Title IX/Sexual Misconduct

Per the UHS Sexual Misconduct Policy, your instructor is a “responsible employee” for reporting purposes under Title IX regulations and state law and must report incidents of sexual misconduct (sexual harassment, non-consensual sexual contact, sexual assault, sexual exploitation, sexual intimidation, intimate partner violence, or stalking) about which they become aware to the Title IX office. Please know there are places on campus where you can make a report in confidence. You can find more information about resources on the Title IX website at <https://uh.edu/equal-opportunity/title-ix-sexual-misconduct/resources/>.

Security Escorts and Cougar Ride

UHPD continually works with the University community to make the campus a safe place to learn, work, and live. Our Security escort service is designed for the community members who have safety concerns and would like to have a Security Officer walk with them, for their safety, as they make their way across campus. Based on availability either a UHPD Security Officer or Police Officer will escort students, faculty, and staff to locations beginning and ending on campus. If you feel that you need a Security Officer to walk with you for your safety please call [713-743-3333](tel:713-743-3333). Arrangements may be made for special needs.

Parking and Transportation Services also offers a late-night, on-demand shuttle service called Cougar Ride that provides rides to and from all on-campus shuttle stops, as well as the MD Anderson Library, Cougar Village/Moody Towers and the UH Technology Bridge. Rides can be requested through the UH Go app. Days and hours of operation can be found at <https://uh.edu/af-university-services/parking/cougar-ride/>.

Syllabus Changes

Please note that the instructor may need to make modifications to the course syllabus. Notice of such changes will be announced as quickly as possible through the course shell in Blackboard® and/or email.

Helpful Information

Coogs Care: <https://uh.edu/dsa/coogscare/>

Student Health Center: <https://www.uh.edu/healthcenter/>

Appendix A: Shopper Shadowing Exercise

Objective: To get insights from shadowing a grocery store shopper.

1. Get consent from a friend or family member to observe/probe them as they shop in a grocery-store.
2. Follow them as they shop in the store, without interfering their behavior in the store.
3. Simply observe everything they do from the moment they step in the store, including the path they take (do they start with the dairy and move to the veggies), what they look at, what they take in their hands, what they put in the cart, how they check-out, whether they return anything.
4. Once they are done with the shopping, pick three products they considered and did not buy or considered and bought, and ask why they considered/bought what they did (the story behind the choice; if it is not the first time, then, the story of how they came to choose the product the first time they did).
5. In addition, use your use your observations/questions to generate a few insights that might be useful to one or more of the following:
 - a. the grocery store manager
 - b. the marketer of the product (chosen/not chosen)
 - c. public policy institutions (for instance, FTC, consumer protection agencies etc.).
6. Be prepared to make a short 5-minute “insights story presentation” (please have slide-decks).
 - a. Please include photos/videos or other notes as part of your insights story presentation.

Resources:

<https://think.design/user-design-research/shadowing/> This gives an excellent introduction to shadowing as a form of research. If you find other resources for observational research online, feel free do check them out.

Appendix B

Post-Class Insights Submission and Peer Assessment Grading Rubric

The PCI submission contains two insights that you brought to the class or took away from the class. Each insight should specify (a) what the insight is?, and (b) why it is insightful to you?

What is an Insight?

An insight is a conceptual idea, an “aha moment”, something new you learned about topic being discussed. For instance, it could be about:

1. the company and what it does (products, ads, pricing, distribution, analytics, market research etc.) and/or
2. the customer (segments, target markets, behaviors, satisfaction, influence etc.) and/or
3. the marketplace at large (competition, collaborators, stakeholders) and/or
4. the context (economic, social, regulatory, legal, technical).

If the insight is your own contribution, then, mark this with a “(C)”, and if it is something you took away from the class, flag it with a “(T)”.

Why is it insightful?

Here I want you to describe why that insight resonates with you, what makes it an “aha moment”. This could take many forms. You could:

1. Elaborate on the conceptual piece and describe how it might affect other aspects of a firm’s marketing operation.
2. Provide an illustration of the idea which could be from the world of business or from personal experience. In other words, they are describing an “aha” moment.
3. Identify a tension in the insight.
4. Connect the insight to other parts of the class discussion.
5. Connect the insight to the case discussion in class.

Here is a grading scheme based on both the quality of the insight, and the reasoning behind why it is insightful. When you do the peer assessments, you may use this rubric for assigning grades.

Category	Feedback	Points
Excellent	The insight is crystal clear, it is a major idea, and your submission gives ample reasoning as to why that idea resonates with you.	5
Very good	The insight is really good and does provide some reasoning as to why you found it interesting. However, the reasoning why it resonates with you is not clear/strong.	4
Good	The insight is good and does provide some reasoning as to why you found it insightful. However, the reasoning regarding why it resonates with you is vague/weak.	3
Passing	The insight is good, but there is no reasoning as to why it appealed to you.	2
Participation	The insight is weak or not clear, and the reasoning is either absent.	1