

Assurance of Learning Report – Master of Science in Marketing – MKTG 53303

Semester & Year: Spring 2025	Degree Program Name: Master of Science in Marketing
Course Name: Retailing Strategy and Processes	Course Number: MKTG 53303
Faculty Name: Craig Geiger	Number of Students Assessed: 17 (100%)
Assessment Method: Final Exam – Rubric – 100 Points in 4 parts: <ul style="list-style-type: none">• Section I: Department Store Channel Retail Strategy – 30 points• Section II. Blue Ocean Strategy Analysis – 50 Points• Section III: International Strategy Analysis – 10 points• Section IV: Writing, Grammar, Citations – Graduate Level – 10 points	
Improvement Activities, Suggestions, Plans (required if results are below 80%, encourage all other times): <ul style="list-style-type: none">• Adjust the points for Sections I, II and III for alignment (30 points each section)<ul style="list-style-type: none">○ New point total with adjustments: 30-30-30-10 for the questions and report writing.• Increase assessment of strategic thinking reflected in the question answers as determined by the application of strategic frameworks covered in the course in the student responses.	

Assessment Results

- **Average grade: 98.11 points**
- **% Students passed: 100%**

MKTG 53303 Final Exam

- **Final Exam Assignment Directions, Questions – next 2 pages**
- **student submission example and grade sheet – following 6 pages**



MKTG 53303 – Retail Strategy - Spring 2025

Final Exam

Due Date: 6 PM May 8, 2025 (Thursday)

Instructions

- This is to be done individually and submitted on Blackboard (in the Assignments tab).
- Review the Final Exam Rubric to guide your paper submission.
- All responses need to be typed in Microsoft Word.
- 100 points for the exam: 90 points for responses to the three questions below and 10 points for overall formatting, language & grammar in your write-up.
- Page limit is maximum 3 pages (single or double spaced) for each of the sections.
- Cite any external sources properly using APA citation format.
- Note that these are all strictly your own responses.
- You must earn 80% to pass the exam and the course.

Address these 3 Exam Sections Questions

Section I. Retail Strategy – Department Stores Channel – 30 Points

Consider that you are the Chief Strategy Officer of Dillard's, reporting to William T. Dillard II, CEO of Dillard's and a University of Arkansas Walton College graduate. – 30 Points

1. Discuss Dillard's retail strategy components and current business results, and compare the results with two competitors. A chart summary is acceptable. Briefly summarize how Dillard's business results compare.
2. Identify 5 factors that are important to Department Store shoppers. These factors could be based on class discussions, textbook chapters, or other resources.
3. You are being asked by William Dillard to suggest ways to attract non-customers (customers who currently shop extremely infrequently or do not shop at Dillard's). Identify 5 potential factors/attributes that would interest non-shoppers you would recommend at Dillard's. Consider factors we have reviewed this semester.

Section II. Blue Ocean Strategy Analysis – Wawa and Sheetz – 50 Points

Quick service/fast food restaurants, convenience stores, and gas stations are some of the lowest margin, highest risk business types. Wawa and Sheetz are in all three categories and the companies continue to be successful. This section explores the elements of a Blue Ocean strategic approach to retail. Reference the retailer stories (The Wawa Way; The Sheetz Story) to address the questions. Be sure to include citations from the readings, etc. in your answer.

I. Introduction/Summary

1. Briefly summarize and compare the history of Wawa and Sheetz - similarities and differences in the founding:
 - *how the founding leaders developed the organization retail strategy and how these early leaders continue to have an influence on the organizations today*

II. Strategy/Blue Ocean - Based on The Wawa Way and The Sheetz Story

1. Compare how Wawa and Sheetz are executing a Blue Ocean strategy. Was it a formal, planned application in their business evolution?
2. Summarize their strategies - what are the main pillars of the Wawa and Sheetz strategies in the retail industry? Is it clear what they are trying to accomplish? How have they communicated that strategy?
3. List 3 similarities and differences you found between Wawa and Sheetz in the operation of their businesses.
4. Discuss the key events that these retailers encountered and captured in their stories that dramatically changed the trajectory of the business, reflecting a component of blue ocean strategy - adjustments that set the organization apart from competition.

Section III. Retailer International Expansion Strategy – 10 points

This semester, we have discussed challenges retailers can experience expanding from their home market into international locations. Here are some examples:

- Target in Canada
- Walmart in Germany, Japan, Brazil, and South Korea
- Home Depot in Germany, China, South America
- Best Buy in China

And some international retailers have not been measurably successful with expansion into the U.S. market. Examples:

- Lidl
- Uniqlo
- Tim Hortons
- Tesco

But there are retailers who continue to be successful expanding internationally; Aldi in the U.S., IKEA in several markets, and Lululemon are 3 examples.

1. Provide a short summary of what you believe are the key retail strategy elements for successful retailer expansion outside of their home market. Use examples from our discussions and the articles listed in your analysis and conclusions.
 - *Harvard Business Review: "Retail Doesn't Cross Borders"*
 - *Kelley School of Business: "Lessons learned from international expansion failures and successes"*

Here are a few additional international expansion examples for reference and your consideration:

Why Ikea Succeeds Around The World While Other Retailers Falter

<https://www.forbes.com/sites/warrenshoulberg/2018/07/30/put-another-stamp-on-the-ikea-passport/?sh=48ecfbb73f7c>

Inside the U.S. Restart for Tim Hortons

https://www.franchisetimes.com/issue-archive/2024/january/inside-the-u-s-restart-for-tim-hortons/article_d4d46352-9f5d-11ee-8b57-63ddadd6b77f.html

Example: Student Final Exam Report Submission

Section I. Retail Strategy – Department Stores Channel – 30 Points

Consider that you are the Chief Strategy Officer of Dillard's, reporting to William T. Dillard II, CEO of Dillard's and a University of Arkansas Walton College graduate. – 30 Points

1. Discuss Dillard's retail strategy components and current business results, and compare the results with two competitors. A chart summary is acceptable. Briefly summarize how Dillard's business results compare.
 - Dillard's retail strategy includes premium products at mid to high pricing, prioritizing customer service in stores, offering products online through an omnichannel experience, and focusing on expanding store locations in the Midwest and southern region of the United States. They target consumers who are willing to pay premium prices for products, offering minimal markdowns. The online presence may be lacking compared to competitors, but that does not keep Dillard's from being financially successful and a major competitor in the market. Dillard's for the 2024 fiscal year had \$593 million in net income, \$6.48 billion in net sales, 41% retail gross margin, and earnings per share of \$36.82.
 - Nordstrom, a competitor of Dillard's, reports their results for the 2024 fiscal year as follows: Nordstrom made \$14.6 billion in net sales, \$294 million in net income, and a 38% gross margin.
 - Macy's, which also owns Bloomingdales, had a 2024 fiscal year with \$22.3 billion in net sales, \$582 million in net income, and a 38.4% gross margin.
 - Dillard's compared to Nordstrom and Macy's has lower net sales. But, Dillard's is beating them on a marginal basis. Nordstrom and Macy's are doing more online retail compared to Dillard's, but those stores also have locations nationwide. Dillard's can continue using their strategic approach to compete marginally, and if looking to expand, maybe consider opening stores in new locations outside of their focus and increase their omnichannel presence.
2. Identify 5 factors that are important to Department Store shoppers. These factors could be based on class discussions, textbook chapters, or other resources.
 - (a) Price & Value
 - i. Can customers get the same products or the same quality of products at a different store offering a better price? We saw this trend also in our Ross Dress for Less presentation. Consumers at the department level are willing to pay a premium price for products but want trusted and well-known brands.
 - (b) Ease of Shopping
 - i. Customers may prefer a location that is closer to them or has an easier access point. This also includes omnichannel options. Customers prefer websites that are easier to access or have better features over another department store's website. Customers also may want to see if an item they are searching for is in stock through an online access point before going to a physical store.
 - (c) Brand Selection
 - i. When shopping, customers may search for specific brands that are unique to a department store. For example, Dillard's carries the brand Gianni Bini which

is exclusively sold in only Dillard's. Shoppers want brands that are on-trend and trusted.

(d) Service

- i. Customers want a good service experience when shopping in a store. Customers often look for employees who offer to help them shop, set up a fitting room, are available to ask questions and more. Employees should strive to make a shopper's experience special and tailored to them. This can help create a good brand reputation, and customers can expect similar service at other locations.

(e) Aesthetic of the Store

- i. A store's aesthetic and vibe are important to a shopper. This includes customer service reputation, cleanliness, lighting, and organizational values. These are all factors customers take into consideration when evaluating their store experience. This can weigh in on customer preferences and satisfaction. This factor can also attract or turn away customers.

3. You are being asked by William Dillard to suggest ways to attract non-customers (customers who currently shop extremely infrequently or do not shop at Dillard's). Identify 5 potential factors/attributes that would interest non-shoppers you would recommend at Dillard's. Consider factors we have reviewed this semester.

- (a) Expand socials for the Dillard's Campus Collective program. Dillard's currently partners with certain universities to give fashion students the chance to expand their leadership and fashion experience. While these ambassadors model the products, they do not have specific social accounts for each university. The ambassadors currently post on their personal accounts, but there could be a larger reach through Dillard's specific accounts. In a 2024 study by business.com, they concluded that 50% of Instagram users interact with brand content at least once per day. To target young women entering the professional work industry, I suggest tailoring content to the students on each university campus and creating social pages for the ambassadors. The ambassadors can also promote the events they host on social platforms.
- (b) Same-day curbside pickup. While exploring the Dillard's website, I noticed there is an option to pick up products in store or curbside, but it does not specifically tell you if the item selected would be ready to be picked up on the same day. There was a possibility that it would be available for same-day pickup, but they couldn't tell a shopper with 100% certainty. To enhance a shopper's omnichannel experience and make it easier to shop Dillard's products, the company should add a same-day pickup feature to its website. This makes shopping more convenient and competitive with other department stores like Nordstrom which already offer this feature.
- (c) Targeted social ads. Increase paid media so ads will pop up on the demographic of new consumers Dillard's wants to reach. This could be through social media platforms such as Instagram, and Facebook, or through email marketing. Start with targeting people who have shopped at or frequently shop at competing department stores. Ideally, these people would fall in the Gen Z and Millennial demographic. Utilize Google Ads, display, and search. Meta, carousel ads, and story ads, can be utilized here. Carousel ads on Instagram get a 32% higher click-through rate, these

would be ideal for the younger demographic Dillard's may want to target. There are a multitude of options when it comes to paid media on the placement of ads and platforms to utilize.

- (d) Create an influencer clothing line. Considering most Dillard's stores are located in the South and Midwest region of the U.S. this is a great way to attract consumers who are not in that region. Partner with a trusted fashion influencer and create a limited-edition clothing line. This is a great way to reach new customers from the influencers' followers and prompt people to go in-store or online depending on where they live. This can lead to increasing online conversions as well.
- (e) Private label extension. Create a clothing line extension with prices lower than the normal premium brand pricing. This is a way to target new customers who may not have the money to pay for premium products yet, but still want to shop at a trusted store with a large selection of brands and items. This allows Dillard's to attract a new target market of customers and start brand loyalty likely at a younger age.

Section II. Blue Ocean Strategy Analysis – Wawa and Sheetz – 50 Points

Quick service/fast food restaurants, convenience stores, and gas stations are some of the lowest margin, highest risk business types. Wawa and Sheetz are in all three categories and the companies continue to be successful. This section explores the elements of a Blue Ocean strategic approach to retail. Reference the retailer stories (The Wawa Way; The Sheetz Story) to address the questions. Be sure to include citations from the readings, etc. in your answer.

I. Introduction/Summary

1. Briefly summarize and compare the history of Wawa and Sheetz - similarities and differences in the founding:

- *how the founding leaders developed the organization retail strategy and how these early leaders continue to have an influence on the organizations today*

Both Wawa and Sheetz started as dairy stores and focused on creating a unique convenience store environment for their customers. Wawa was founded in 1964 after transitioning from an iron foundry in Pennsylvania. Once Grahame realized that milk delivery was not going to last, he decided to switch up the strategy and trajectory of the company. That is when his idea of customer-focused convenience came to life. Grahame from the start included his employees in the business operations, drove people in to experience the store aside from just getting gas, and made customers feel like a part of the Wawa family. Wawa showed its commitment to its employees by starting the Employee Stock Ownership Plan (ESOP), and Wawa associates have a 38% ownership stake in the company (Stoeckel and Andelman). Sheetz started a little before Wawa in 1952, also in Pennsylvania. Bob Sheetz is the founder, and continually emphasizes innovation and creativity to differentiate themselves in the convenience market while also empowering employee operations. Bob strategically located his stores near college cities that were different from your regular gas stations that are typically off the highway. People living in the city were prompted to stop by their local Sheetz during a late-night outing to get a quick treat and snack. Sheetz is also customer-service-focused. "Today, the average Sheetz location employs 32 people", and that is because the MTO requires customer and employee interaction which is what both parties want (Womack).

II. Strategy/Blue Ocean - Based on The Wawa Way and The Sheetz Story

1. Compare how Wawa and Sheetz are executing a Blue Ocean strategy. Was it a formal, planned application in their business evolution?

- Blue Ocean is creating demand rather than fighting over it. Wawa and Sheetz both entered the blue ocean in their business journey. Wawa evolved into the Blue Ocean, filling in gaps they saw in the current market which was not largely planned but more natural. Wawa wanted to create a more personal and friendly retail space and saw the value that customers had for that. After Wawa realized milk delivery was not fulfilling long term, Grahame Wood opened the first Wawa Food market in 1964 (Stoeckel and Andelman). Wawa is a combination of a traditional convenience store (a word they do not use) and above and beyond customer service. It is unlike a normal grocery store and a normal convenience store or gas station.
- Sheetz was a more planned dive into the blue ocean. Sheetz utilized innovation to enter the market and combined fast casual dining and convenience. Sheetz designed the Made-to-Order process and touchscreen system which was a technological addition a year earlier than a lot of their competitors. This made the brand feel attractive to younger generations which was different than what other stores were doing. Also, "By telling customers that something is 'made to order,' you're letting them know that they can have anything that they want" (Womack). Through innovation and strategically targeting audiences not captured by the competing market, Sheetz entered the blue ocean.

2. Summarize their strategies - what are the main pillars of the Wawa and Sheetz strategies in the retail industry? Is it clear what they are trying to accomplish? How have they communicated that strategy?

- Wawa Main Pillars:
 - Servant-leadership (a great strategy according to Craig too): Wawa prioritizes customers and treats them like family. They build emotional connections and demonstrate service at all times.
 - Community: "The Wawa Way" is the way of measuring the share of heart, which is a unique way to assess excellence (Stoeckel and Andelman).
 - Employment/Private Ownership: Wawa is not a publicly traded company. They stay true to keeping information internal and long-term oriented. Stockel and Andelman talk about the benefits of keeping it internal because "once a company goes public, it has no immunity to the whims of the markets and market investors."
- It is clear that Wawa values service, its customers, and being privately traded. They have communicated these strategies through marketing efforts, the efforts of employees across all locations, and their strong brand reputation.
- Sheetz Main Pillars:
 - Technology innovation: Sheetz was the first store to offer self-service kiosks. Continually innovated new products that made themselves unique in the market.

- Targeting younger generations: Sheetz strategically positioned itself near college towns and utilized youthful brand imaging. This was something other convenience stores were not doing at the time, but Sheetz capitalized off of this missed demographic and ended in great success. Sheetz was a go-to destination for college students.
- Made-to-Order (MTO): This was a key sales driver and something that set them apart from their competitors. This also gave customers control and made them feel more special.
- Sheetz values the strategic efforts with continual innovation and strategic placing of their stores.

3. List 3 similarities and differences you found between Wawa and Sheetz in the operation of their businesses.

- Similarities
 - Both business employee culture ownership.
 - Both shifted from one business idea when starting up to unique foodservice experience environments.
 - Both foodservice industries along with gas offerings.
- Differences:
 - Sheetz is strategically targeting younger consumers and Wawa targets a broader market that is more family oriented
 - Sheetz was more innovative with technology early on, where Wawa grew in different ways.
 - Sheetz's menu is more centralized which Wawa is decentralized and wants consumers to make purchasing decisions in-store with their MTO design.

4. Discuss the key events that these retailers encountered and captured in their stories that dramatically changed the trajectory of the business, reflecting a component of blue ocean strategy - adjustments that set the organization apart from competition.

- Wawa:
 - Transition from milk delivery to convenience retail, a bold move into a new market space.
 - Fresh Food Program in the 1980s helped them move beyond a traditional convenience store and transition into a food destination. They offered more food products differentiation themselves from competitors, serving fresh coffee and more.
- Sheetz:
 - Made-to-order touch-screen food ordering station. Sheetz became known as innovative and technologically advanced. MTO also gave customers freedom to select what they wanted and customer service interactions.
 - Targeting college towns and younger generations which led to major growth. Sheetz saw success in the risk of targeting a different generation of customers compared to what other convenience stores were doing.

Section III. Retailer International Expansion Strategy – 10 points

1. Provide a short summary of what you believe are the key retail strategy elements for successful retailer expansion outside of their home market. Use examples from our discussions and the articles listed in your analysis and conclusions.

We see many successes and many failures when firms expand globally. There are a few factors that lead to success in integration which include slowly integrating, knowing your customers in the market you're entering, strategically locating the stores, making sure there is a need or opportunity to enter the market. I believe a firm should slowly integrate into the market they plan to establish locations in. In the "Lessons learned from international expansion failures and successes" article, we learn that Target bought over 100 locations assuming the integration would be easy. It ended in a major loss for Target. The building's that Target purchased were in bad locations that were hard for people to get to. They were inconvenient and took a lot of money to fix. Carrefour China is a great success story where they started off easing their way into a new market. Carrefour is a French company that entered through a joint venture with a Chinese firm. Carrefour opened 17 stores in major cities where potential customers were located. Another point that I believe leads to success, and a factor Carrefour executed well, is adapting to the culture of the market they entered. Carrefour, as mentioned earlier, used local resources and firms to integrate into the market. You should never assume what a person or culture needs, but ask what the culture and people need then fill in the gaps. Carrefour gave responsibility to store managers so the managers could select the products sold in stores, and who they hired. It makes sense to entrust those decisions to someone who knows the community they are in well. Other firms mentioned in the articles that integrated well were IKEA, Aldo, and Nordstrom. These firms all filled in the gaps in the market, while strategically positioning themselves in a new environment.

Convenience Store News. (2016, August 15). *Sheetz's new sandbox: College towns.*

Convenience Store News. <https://csnews.com/sheetzs-new-sandbox-college-towns>

Corstjens, M., & Lal, R. (2012, April 1). *Retail doesn't cross borders: Here's why and what to do about it.* Harvard Business Review. <https://hbr.org/2012/04/retail-doesnt-cross-borders-heres-why-and-what-to-do-about-it>

Dillard's, Inc.. *reports fourth quarter and fiscal year results: Tue, 02/25/2025 - 06:50.* Dillard's Investor Relations. (2025, February 25). <https://investor.dillards.com/news-releases/news-release-details/dillards-inc-reports-fourth-quarter-and-fiscal-year-results-4>

Kuligowski, K. (2025, March 14). *Why your business should be on Instagram.* business.com. <https://www.business.com/articles/10-reasons-to-use-instagram-for-business/>

Macy's, Inc.. *reports fourth quarter and fiscal year 2024 results.* Macy's, Inc. Reports Fourth Quarter and Fiscal Year 2024 Results :: Macy's, Inc. (2025, March 6). <https://www.macysinc.com/newsroom/news-details/2025/Macys-Inc.-Reports-Fourth-Quarter-and-Fiscal-Year-2024-Results/default.aspx>

Nordstrom *reports fourth quarter 2024 earnings.* Nordstrom. (2025, March 4). <https://investor.nordstrom.com/news-releases/news-release-details/nordstrom-reports-fourth-quarter-2024-earnings#:~:text=Full%2Dyear%20revenue%20for%20fiscal,comparable%20sales%20increased%203.6%20percent.>

Stoeckel, H., & Andelman, B. (2015). *The wawa way: How A funny name & 6 core values revolutionized convenience.* Running Press.

Womack, K. (2013). *Made to order: The Sheetz story.* Arcadia Publishing.

Yoder, S. (2015, December 2). *Lessons learned from international expansion failures and successes.* Business Horizons. <https://www.sciencedirect.com/science/article/abs/pii/S0007681315001500>

Assurance of Learning Report – Master of Science in Marketing – MKTG 53303

Semester & Year: Spring 2025	Degree Program Name: Master of Science in Marketing
Course Name: Retailing Strategy	Course Number: MKTG 53303
Faculty Name: Craig Geiger	Number of Students Assessed: 17 (100%)
Assessment Method: Group Strategic Projects <ul style="list-style-type: none">• Group Assignment 1 - Retailer Shopping Environment Assessment – 100 Points<ul style="list-style-type: none">○ Client Sponsor: Walmart• Group Assignment 2 – Marketing Plan/Joint Business Planning<ul style="list-style-type: none">○ Client Sponsor: Revlon• Group Projects 1 and 2 Grading Elements<ul style="list-style-type: none">○ Business analysis and Assignment Write-Up Document○ Presentation and Class Discussion	
Improvement Activities, Suggestions, Plans (required if results are below 80%, encourage all other times): <ul style="list-style-type: none">• Break out the presentation component of the assignment into separate grading modules:<ul style="list-style-type: none">○ Class discussion leadership○ Presentation elements• Corporate Client Sponsor engagement<ul style="list-style-type: none">○ Schedule checkpoints for case assignment questions with the corporate client teams○ Break the semester project into 4 individual assignment deliverables to increase specific knowledge areas and maintain focus	

Assessment Results

- **Average grade – Group Assignment 1 – Retailer Environment: 97.3/100 points**
 - % Students passed: 100%
- **Average grade – Group Assignment 2 – Marketing Plan/Joint Business Planning: 138.4/150 points**
 - % Students passed: 100%

MKTG 53303 – Group Projects – next 6 pages.



MKTG 53303 – Retail Strategy and Processes

Group Assignment – Retailer Shopping Environment Assessment - 100 Points

Due 4/10 – Presentations in Class on 4/10

Objectives

- Analyze a retailer omnishopping environment based on retailer's strategy and core consumer.
- Practice business analysis, strategic assessment, team project, and presentation skills.

Instructions:

1. Retailer Selections: Team 1: Lowe's; Team 2: Bass Pro; Team 3: Lululemon; Team 4: PetSmart

2. Store Visit:

- Plan a visit to the chosen store and conduct a comprehensive store review considering the 4P's of retail strategy (product, price, place, and promotion).
- Pay attention to various elements of the in-store experience, including but not limited to:
 - Product assortment and quality
 - Pricing strategies (regular prices, discounts, promotions, etc.)
 - Store layout and visual merchandising techniques
 - Customer service and staff interactions
 - Promotional materials and signage
 - Take notes and capture photos/videos

3. Online Shopping Environment Audit:

- Explore the store's website, social media platforms, and any other digital channels.
- Assess the following aspects:
 - Product presentation and availability
 - Pricing information and online promotions
 - Ease of navigation and user experience
 - Customer reviews and ratings
 - Online marketing and promotional strategies
 - Compare the messaging and consistency of the online presence with your in-store observations.

4. Presentation Outline:

- Prepare a 40 minute presentation summarizing your findings from the store visit and online shopping audit.
- Include visuals (e.g. images; videos) to support your observations.
- Analyze the similarities and differences between the in-store and online experiences.
- Assess the effectiveness of the store's retail strategy in delivering a consistent message to customers.
- Propose recommendations for improving the store's overall retail strategy.

5. Class Presentation and Discussion:

- Present your findings to the class and business leaders
- Engage in a discussion about the effectiveness of the store's retail strategy and how it aligns with current industry trends.
- Seek feedback from business leaders and classmates to enhance your understanding of retail strategy and its importance.

Note: Students are encouraged to respect store policies and customer privacy during the store visit. Any information or images collected must be used solely for academic purposes and not shared without proper consent.

MKTG 53303 – Retailer Shopping Environment Assessment Grade Sheet

Team: _____

Criteria	Excellent (A) Full Points	Good (B) Partial Points	Needs Improvement (C or below) Minimal Points	Points	Notes
I. Retailer Strategy Analysis (10 pts)	Clear, thorough identification of strategy components; links strategy to core customer	Basic strategy elements included; some connection to customer	Limited or unclear strategy; weak or no customer alignment	/10	
II. Retail Visit – Omnichannel Store Review (30 pts)	In-depth review of all store aspects (product, price, place, promotion); rich detail with photos/notes; strong insights	Covers most aspects; includes some visual evidence; moderate analysis	Surface-level observations; lacks visuals or depth	/30	
III. Online Shopping Audit (30 pts)	Comprehensive assessment of digital channels; strong comparison with in-store experience; clear analysis of UX and messaging	Covers key areas with moderate detail; some comparison with store experience	Incomplete or general audit; lacks comparison or analytical depth	/30	
IV. Presentation Content & Delivery (20 pts)	Engaging, well-organized presentation; includes visuals; strong analysis, discussion, and thoughtful recommendations	Mostly clear presentation; some visuals and recommendations included	Disorganized, lacks visuals, or weak strategic discussion	/20	
V. Presentation Format & Design (10 pts)	Professional slide format; logical structure with opening/conclusion; data and citations included	Clear structure but may lack polish or supporting data	Poor format or disorganized slides; few or no supporting visuals/data	/10	
Overall Comments:					Total Score: ____ / 100



REVLON



MKTG 53303 – Retail Strategy – Group Project Assignment – Due 4/23/25
Revlon White Diamonds Marketing/Sales Plan

Project Purpose – Provide students with:

- A learning opportunity to apply marketing concepts to develop a Market Assessment and Marketing/Sales Plan recommendation to increase awareness, penetration and sales on Revlon's White Diamonds fragrance brand. The assignment elements your group will be working on for this product launch:
 - Retail Market opportunity analysis – Fragrance Category and Revlon strategy
 - Target consumers identification – especially, engaging younger consumers
 - Drivers and barriers to purchase
 - Marketing plan components detailed (4 P's of Marketing)
 - Recommendations to the Revlon leadership and Walmart Fragrances Category buyer
- An example to share with and use with potential employers demonstrating your understanding of the Marketing Plan Process, Joint Business Planning, strategic thinking, market/consumer analysis, and presentation skills through this live, real-world marketing challenge

Assignment Directions (Grading 150 total points – see rubric for details)

- The 4 teams of 4-5 students will develop and deliver a Marketing/Sales Plan Recommendation for the White Diamonds brand based on our course learning topics and will present their plan to the Revlon leadership.
- Marketing Plan Graded Components – Word Document and PowerPoint Presentation
 - Retail Fragrance Market opportunity analysis: (size/scope; interest; trends)
 - Competitive market/products analysis (including retail store visits and online shopper journey)
 - Target consumers identification – current/proposed
 - Marketing plan elements detailed: (objectives, outreach/promotion ideas, packaging, pricing)
 - Presentation to the client organization leadership

Background – Revlon Consumer Products

Revlon was founded in New York City in 1932 by brothers Charles and Joseph Revson and chemist Charles Lachman, and grew to be one of the largest cosmetics companies in the world.

- In 1985, Revlon was sold to MacAndrews & Forbes, a deal led by Ronald Perelman, who took over as chief executive officer. In 1996, Revlon filed for its initial public offering and hit the New York Stock Exchange.
- Revlon continued to diversify and grow over the years, adding multiple brands and product lines. But by 2013, Revlon began showing signs of struggle. In an attempt to diversify and strengthen its portfolio, Revlon acquired Elizabeth Arden in 2016 for \$14 a share in an all-cash deal that totaled \$419.3 million.
- In May 2018, Ronald Perelman's daughter Debra took over as CEO of Revlon.
- Amid an increasingly crowded industry with new competition, Revlon has been challenged for growth, especially as the pandemic slammed the beauty industry, and in June 2022, the company filed for Chapter 11 bankruptcy protection.
- Revlon exited from bankruptcy in April 2023 with new leadership.

Revlon today

- In October 2024, Michelle A. Peluso was appointed Chief Executive Officer of the company, Revlon Group Holdings LLC, and has embarked on a mission to lead a holistic transformation of the company. Her stated goal: *drive consumer centricity across the organization and leverage her deep digital experience to drive innovation. As an experienced brand-builder, she is passionate about maximizing the potential of Revlon's powerful collection of brands, ensuring they remain deeply loved for generations of beauty and wellness consumers to come.*
- Today, Revlon owns some of the world's most iconic brands and product offerings in color cosmetics, skin care, hair color, hair care and fragrances - examples: Revlon, Revlon Professional, Elizabeth Arden, Almay, Mitchum, CND, American Crew, Creme of Nature, Cutex, Juicy Couture, Elizabeth Taylor, Britney Spears, Curve, John Varvatos and Christina Aguilera.

The Opportunity – White Diamonds

White Diamonds is a perfume created over 30 years ago in 1991 by Elizabeth Arden and actress Elizabeth Taylor. The perfume, advertised with a cinematic TV ad starring Taylor, has been an enormous and enduring commercial success, and arguably, popularized the trend of celebrity-branded perfumes which accelerated in the following decades.

Today, the Revlon team is interested in driving the Revlon White Diamonds brand with a new set of consumers in order to grow the brand and Fragrances category as they work with the Walmart Fragrances Category buyer through joint business planning.

Project Client: Revlon Consumer Products – Contacts

- Michele Smithson – Senior Customer Business Manager: michele.smithson@revlon.com
- Sheila Gamble – Vice President, Sales: sheila.gamble@revlon.com

Resources

- Revlon Consumer Products website: <https://www.revloncorp.com/>
- Mintel Reports – Fragrances; Cosmetics: posted on Blackboard
- Walmart.com: [Walmart.com - White Diamonds](#)
- Joint Business Planning information posted on Blackboard

Project Deliverables:

- Marketing Strategies to Deliver Objectives
- Key Performance Objectives/Goals
- Barriers to Awareness and Trial of White Diamonds with Gen Z
- Competitive Retail Market Assessment
- Path to purchase/Shopper Journey assessment: Walmart omnishopping (in-store/online) insights and recommendations
- 2025 Retail Marketing Activation Ideas
 - Social Media Activation – Content Ideas
 - Packaging
 - Sampling
 - Etc.

Questions to consider:

- 4 P's of Retail Marketing/Category Management:
 - Product: What Product attributes are appealing to consumers?
 - Placement: Where is the optimal placement in-store and online? What does Best in Class Placement look like?
 - Pricing analysis: How should White Diamonds be priced at Walmart?
 - Promotion: How does the White Diamonds brand optimize trial with the target consumer through promotion in-store and online? How does the brand drive loyalty through repeat purchases?

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MKTG 55303 – Retail Strategy – Revlon Group Project Assignment Grade Sheet

Group: _____

I. Word Document Write-Up (75 Points)

Criteria	Excellent	Acceptable	Needs Improvement	Comments	
Background Summary: Fragrance Market / Consumer Opportunity Analysis (Size, trends, and growth potential)	Thorough and well-researched market analysis with clear data-driven insights and sources.	Some market analysis included, but lacks depth, clarity, or supporting data.	Little to no analysis or data; lacks relevance or detail.	•	___ /15
Retail Analysis Summary	Insights from retail visits & digital shopping. Clear connections with course learning.	Partial analysis; missing some key insights or connections.	Superficial or missing analysis; lacks supporting evidence.		___ /20
Target Consumer Identification – Current and proposed – White Diamonds brand	Clearly defined current and new target consumers with strong justifications and data support. Persona detailed.	Identifies target consumers but lacks full justification or supporting evidence.	Weak or missing identification of target consumers; lacks clarity.		___ /10
Marketing Plan Elements Summary (Objectives, outreach, promotion, packaging, pricing)	Comprehensive and strategic marketing plan covering all key elements with well-supported recommendations.	Marketing plan includes most elements but lacks depth, rationale, or supporting evidence.	Incomplete marketing plan; missing key elements or lacks cohesion.		___ /20
Overall Quality & Professionalism of Writing (Clarity, organization, grammar, and citations)	Exceptionally well-written, structured, and professional; no grammar issues; proper citations. Built in a Joint Business Planning foundation.	Some organizational or grammatical errors; citations inconsistent or incomplete.	Poorly written, lacks structure, multiple grammar issues, or lacks citations.		___ /10
Total Word Document Score					___ / 75

II. PowerPoint Presentation (75 Points)

Criteria	Excellent	Acceptable	Needs Improvement	Comments	Points
Retail Market & Competitive Analysis Summary (Key takeaways presented effectively)	Clear and compelling market/competitive/consumer insights identified that enhance the case for recommendations.	Some insights presented but may lack clarity or impact.	Weak or missing insights, lacks supporting rationale.	•	___ /20
Marketing Strategy & Plan Presentation (Objectives, activation ideas, etc.)	Strategic marketing plan for Walmart stores and walmart.com: • Details • Timing	Covers most aspects but lacks depth, clarity, or a strong rationale.	Weak or unclear marketing plan; missing key elements.	•	___ /25
Presentation Delivery & Communication (Speaking clarity, confidence, engagement)	Confident and engaging delivery; clear and well-paced speaking.	Presentation is clear but lacks confidence, engagement, or smooth delivery.	Poor delivery; difficult to follow, lacks engagement or confidence.	•	___ /10
Visual Appeal & Slide Design (Professional, clear visuals, minimal text, engaging)	Well-designed, professional, visually appealing slides; information is easy to digest.	Some slides well-designed, but others cluttered or lacking visual engagement.	Poor slide design; cluttered, too much text, or lacks visual appeal.	•	___ /10
Total Presentation Score					___ / 75

Final Score:

Total Score (Word Document + Presentation): ___ / 150