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## Assessment 2 Instructions: Marketing Analysis Report with Metrics

Develop a 3-4 page marketing analysis report for an additional business location using publicly available data. You may choose either a small, locally owned business or a publicly traded business for your analysis.

### Introduction

Completion of this portfolio work project will help your understanding of how to identify an additional location as part of a market analysis report for business stakeholders, using publicly available data.

### Scenario

For this assessment, **choose either Option A or Option B**. You do not need to do both. Both options will be graded using the same scoring guide.

**Option A:** A local private equity group has asked for your assistance in evaluating a small locally owned business in your community. While you will not directly contact the business, you do need to have a general understanding of the company. Appropriate types of businesses for this market analysis include a hair salon, a family-owned restaurant, a boutique retail shop, a local hardware store, or a similar type of business. The business should have only one or two existing locations. Your focus should be on the primary location of the business if it has multiple locations.

**Option B:** The Vice President of Marketing at your publicly traded company has asked you to conduct a market analysis for an additional location for the firm. While you will not directly contact the business, you do need to have a general understanding of the company. Appropriate types of businesses for this market analysis include an aerospace manufacturing firm, an automobile manufacturing firm, a "big box" retailer, or a similar type of business. Your focus should be on the corporate location of the business as the primary location.

### Your Role

Whether you are analyzing an additional location for a small locally owned business in your community, or you are analyzing an additional location for a publicly traded company, your role as the marketing manager is the same. Focus on the primary location or corporate location in your data analysis.

### Requirements

Whether selecting Option A or Option B, be sure to interpret each figure and table used and summarize the data results. Include the following in your marketing analysis report using these three topical areas:

## 1. Company Description

- Evaluate the nature of the business, including a description of the general nature of the business, its primary location, and the industry in which it operates. The description must include the North American Industry Classification System [PDF] (NAICS) code and Standard Industrial Classification (SIC) code for the business, and specify if this is primarily a business-to-business (B2B) or business-to-consumer (B2C) company.
- Evaluate the characteristics of the products or service being marketed.

## 2. Industry Analysis and Competitive Outlook

- Evaluate the competitive environment. What does an industry evaluation suggest about the competitive environment?
- Evaluate sources of data available for estimating market characteristics and making marketing decisions.
  - What is the estimated market size for the business at its current location? What impact does the population size, average household size, percent of high school degrees or higher, and median household income for the zip code, city, county, and state it is located in have on the selected business?
    - Use at least two different types of figures and two tables to present this data. Consider what the figures and tables convey and summarize the data.
  - What does the demographic and sociographic data say about the current location? What are the characteristics of the location that make it a good location or a poor location in terms of access to customers and availability of labor?
  - What segment(s) does (or should) the business be targeting for customers?
- Evaluate social media marketing strategies. What social media strategies can be used to reach this market segment and what metrics can be used to evaluate their effectiveness? Analyze metrics to measure the effectiveness of your social media strategy.

## 3. Identification of Additional Location

- What appropriate zip code recommendation would you make for an additional location for your selected business, based upon the known characteristics of the business in its current location? The recommended location should be consistent with the identified market segments and demographic and sociographic characteristics of the current location.

## Deliverable Format

### Requirements:

- Option A or Option B should be 3–4 pages (in addition to the title, reference, and appendix pages).
- Use at least two different types of figures and two tables to present the data. At least one figure should present data at a single point-in-time, and at least one figure should present data over time. Be sure to correctly label all elements of your figures and tables in your report and appendix.

### Related company standards:

- The marketing analysis report is a professional document and should therefore follow the corresponding MBA Academic and Professional Document Guidelines (located in MBA Program Resources), including single-spaced paragraphs.
- In addition, include the following:
  - Title page.
  - References page. Use at least three scholarly resources, one of which must come from the *Wall Street Journal*, *Forbes*, or *MIT Sloan Management Review*.
  - APA-formatted references.

### Evaluation

By successfully completing this assessment, you will demonstrate your proficiency in the following course competencies through corresponding scoring guide criteria:

- Competency 1: Apply marketing theories and models to develop marketing strategies.
  - Evaluate the nature of the selected business.
  - Evaluate the characteristics of the product or service being marketed for the selected business.
  - Evaluate the competitive environment for the selected business.
- Competency 2: Evaluate the effectiveness of marketing strategies and methods.
  - Evaluate social media marketing strategies for the selected business.
- Competency 3: Use data to support evidence-based marketing decisions.
  - Evaluate sources of data available for estimating market characteristics and making marketing decisions.
- Competency 4: Analyze the role of technology and social media in effective marketing strategies.
  - Analyze metrics to measure effectiveness of the social media marketing strategy for the selected business.
- Competency 5: Communicate marketing needs, opportunities, and strategies with multiple stakeholders.
  - Write coherently to support a central idea with correct grammar, usage, and mechanics as expected of a business professional.

Faculty will provide feedback as if they were the recipient of your deliverable in the workplace, using the scoring guide. Refer to the assessment scoring guide to ensure that you meet the grading criteria before submission.

### ePortfolio

This portfolio work project demonstrates your competency in applying knowledge and skills required of a MBA learner in the workplace. Save this activity to your ePortfolio for future reference in the workplace.



### SCORING GUIDE

Use the scoring guide to understand how your assessment will be evaluated.

[VIEW SCORING GUIDE](#) 

