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USE OF CLIENT-BASED PROJECTS IN BUSINESS EDUCATION: A COMPARISON OF UNDERGRADUATE AND GRADUATE PEDAGOGY

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ABSTRACT

This paper reports the results of a comparative qualitative study of pedagogical approaches in applied learning in business education. The comparison consisted of dissecting the practice of embedding client-based projects in both undergraduate and graduate business education at a liberal arts university. Client-based projects allow students to go beyond the concepts discussed in the classroom and to engage in problem-solving activities related to discipline content areas. These client-based projects take a number of forms: they may be individualistic or group-based; they may be developed by the professor or involve working for real organizations; or they may be specific in nature or integrate all of the relevant course materials. The underpinning of each of the two courses' marketing planning projects is the iterative approach to student learning where students are expected to revise and resubmit their work until they have met the professors' expectations as set forth in the course.

Key Words: Client-based projects, Social loafing, Group dynamics, Group project assessment

INTRODUCTION

There is a move toward greater experiential learning on college campuses worldwide (Ames, 2006). Client-based projects have long been used as a pedagogical tool in the university environment. Such projects allow students to go beyond the concepts discussed in the classroom and to engage in problem-solving activities related to discipline content areas. These client-based projects take a number of forms: they may be individualistic or group-based; they may be developed by the professor or involve working for real organizations; or they may be specific in nature or integrate all of the relevant course materials.

This paper addresses the use of such client-based projects in two marketing courses: an undergraduate capstone planning course and an MBA marketing management course at one university. Both courses involve groups of students developing marketing plans for community businesses, organizations or government entities and both courses' projects are integrative in nature. The underpinning of each of the two courses' marketing planning projects is the iterative approach to student learning where students are expected to revise and resubmit their work until they have met the professors' expectations as set forth in the course.

Ultimately, the student marketing planning projects in both courses have contributed to positive student learning experiences and closer relationships between the university and the communities involved, thus fulfilling the mission of the university and respective college in two critical areas: student learning and regional engagement. This paper examines the differences in the approaches to developing student marketing plans in graduate and undergraduate courses and explains the professors' rationale in choosing different pedagogical methods depending on the level of student being taught.

LITERATURE REVIEW

Client-based Projects

Real World projects, also known as client-based projects (CBPs), provide a fertile learning environment in which students apply their marketing knowledge to an actual client organization. This experiential or hands-on learning enables students to hone specific skills like: problem-solving, critical and analytical thinking, oral and written communication, and team work.

Literature suggests that two keys to successful applied projects in the college classroom are multiple iterations of students' work and persistent feedback from the professor (de los Santos & Jensen, 1985; Haas & Wotruba, 1990; Razzouk, Seitz & Rizkallah, 2003). The iterative process, whereby students revise and resubmit their work, often necessitates multiple versions of a single section. This iterative process requires a considerable time commitment from the faculty member, who reads and prepares feedback, as well as from students who are required to improve upon their written work, i.e., organization of material, content appropriateness and sufficiency, and their written words. This time commitment to feedback is often perceived as overwhelming for many instructors, thus making them apprehensive about venturing into client-based projects.

The literature shows us that the benefits to professors of real-world or client-based projects are great and varied, they include:

- Facilitating active learning (Gremier et al, 2000; Razzouk, Seitz, & Rizkallah 2003)
- Fostering students' skill enhancement (Barr & McNeilly, 2002; Kennedy, Lawton, & Walker, 2001)
- Fostering greater student ownership in a class project (Eastering & Rudell, 1997)

The literature reflects many benefits for the students or student teams, they include:

- Increased motivation at the knowledge that their recommendations may impact an actual business (Fox 2002; Goodell & Kraft 1991)
- Enjoyment with the variety of project-related experiences, i.e., meeting with an actual client, survey creation and dissemination, etc.. (Lee & Tuttle, 2004)
- Exposure to different business philosophies, marketing methods, and available budgets (Klink & Athaide, 2004)

While research is generally positive toward the inclusion of applied project pedagogy, there are some cautionary tales. A professor may mistakenly select a client that is unable to devote any time to the student team thus inhibiting the team's ability to understand its client's business. A "bad" client is one that may want to be "over-involved" or "under-involved" (Lopez & Lee, 2005). Further a professor may inadvertently select a client project that lacks complexity; a project that is too simple will not challenge students and will not achieve course learning objectives.

Team Projects

Cooperative learning produces higher achievement, more positive relationships among students, and healthier psychological adjustment than do competitive or individualistic experiences (Healey, 1988;

Hernandez, 2002). Skills learned from team projects translate into the workplace, creating employees who can collaborate, share skills and knowledge, and communicate their ideas effectively. Industry is looking for students who have special skills such as accepting responsibility for their own learning and development and who have experience working as part of a group. According to Hernandez (2002), as organizations continue to decentralize decision making the ability to deal with today's complex and changing environment will require a greater reliance on teams. Instructors who effectively use group projects can link educational experience with workplace experience, thus improving their students' career opportunities.

Advantages to team projects:

- assume leadership roles in a management environment (Schoenecker, Martell, and Michlitsch, 1997)
- organize tasks to accomplish certain objectives
- delegate, taking into account individual strengths and weaknesses of group members (Maranto & Gresham, 1998)
- resolve conflicts (Blowers, 2002; Colbeck, 2000)
- gather and analyze large amounts of data
- distinguish relevant information from non relevant information as it relates to project objectives
- solve problems (Schoenecker, Martell, and Michlitsch, 1997)
- communicate ideas (Blowers, 2002; Colbeck, 2000)

In addition, group projects benefit from the "two heads are better than one" approach, recognizing the generally accepted rule of thumb that "people working in groups can accomplish more than people working individually" (Huff, Cooper & Jones, 2002). Healey argues that such collaboration "produces higher achievement, more positive relationships among students, and healthier psychological adjustment than do competitive or individualistic experiences" (1988, p. 262).

The skills developed in group projects translate well to the workplace, arming students with the tools they will need to be successful employees and managers, no matter what career they pursue (Reif & Kruck, 2001; Huff, Cooper & Jones, 2002).

Disadvantages to team projects:

- toxic conflict affecting outcomes (Reif & Kruck, 2001)
- 'free-riding' or social loafing off others' work (Brooks & Ammons, 2005)
- Team composition (Brooks & Ammons, 2005)
- difficulty in grading individuals within a group (Lordan, 1996)
-

While challenges like grading persist, there exists greater overall benefit to a team approach to learning (Reif & Kruck, 2001). In grading, projects can be graded as a whole and each student in turn given the overall project grade or professors can make distinctions among individual student's contribution to the project's outcomes. Grading individually is problematic for professors because it is difficult to determine students' level of participation in the process (Kruck & Reif, 2001).

Further, if the group is not well-balanced in terms of personalities and skills, it may be set up for failure. For example, a group consisting of all "leaders" or math whizzes is likely to impede progress and productivity. Finally, there are transaction cost implications for students that result from having to interact and collaborate with group members, such as time spent in scheduling and meeting as a group and in negotiating differences of

opinion in formulating and writing up a group research project. This transaction cost challenge can be mitigated by allowing students in-class time for group work sessions (Lordan, 1996).

Pedagogy

A serious pedagogical issue is how much the professor becomes involved in the group process. Professors can direct how the project work is handled by setting guidelines for group interaction and/or providing a contract indicating how the group will function and what each member will do, sitting in on group meetings, requiring regular reports on group interactions, and requiring individuals to “grade” their group members on process issues such as cooperation, collegiality, timeliness, and conflict management. Alternatively, the professor can take a “hands off” approach to group issues and focus his/her participation in the process around content issues – providing generic outlines for the final paper, providing research assistance, and requiring regular reports on accomplishment of project objects (McCorkle, et al, 1999).

Professors’ response to group problems should strike the delicate balance between letting students work out their own problems and stepping in to keep them on track (Lordan, 1996). To maximize students’ successes, the instructor should establish clear objectives at the outset of the project. Setting objectives includes providing students with clear timelines and progress report requirements. The instructor should take an active role as team supervisor. To encourage group productivity and open lines of communication, the instructor should encourage student groups to develop psychological contracts, a set of expectations or rules specifying their functions in the group relationship, (McCorkle, et al, 1999).

There are a few essential elements to successful implementation of formal cooperative learning groups: positive interdependence, individual accountability/ personal responsibility, teamwork and group processing. Positive interdependence is when all group members benefit from the success of other group members. Students must believe they are linked together in a way that one cannot succeed unless the other members of the group succeed and vice versa. Ways of structuring positive interdependence include having common rewards such as a shared grade (reward interdependence) and task interdependence through division of labor (Smith, 2004). Common ways to structure individual accountability include giving individual exams, using self and peer assessment, requiring individuals to provide the professor with his/her individual research, and calling on individual students to report on their group’s efforts. Acclimation to group process can occur when students are provided instruction on group process considerations, like: group think, social loafing, emergent leaders, etc. Before choosing and implementing any formal cooperative learning strategy, several conditions should be evaluated to determine whether or not it is the best approach: there needs to be sufficient time available for students to work in groups both inside and outside the classroom; the task should be complex enough to warrant a formal group; and the instructor’s goals should include the development of skills that have been shown to be affected positively by cooperative learning, such as critical thinking, higher level reasoning, and teamwork skills.

Forming Groups

Self-selected groups have the potential greater motivation and less conflict since likely such individuals have worked together in the past (Reif & Kruck, 2001). However, students consistently working together impedes creativity and lessens the student’s exposure to different ideas and perspectives. Kruck & Reif (2001) point out that “in the working world, most teams are not self-selected, instead they are assembled based upon skill inventories, historical performance, and individual availability.”

Lordan (1996) identifies three variables often considered in assembling groups -- intellectual ability, degree of motivation, and interpersonal skills. The idea is to balance off the variables, creating a degree of

equality within the groups. While agreeing that the first variable has some empirical support, Lordan (1996) characterizes the other two variables as highly subjective, making the process of balancing groups difficult at best. An alternative to equally balanced groups based on selected variables is to put hard working, motivated students together in groups and social loafers together in groups, allowing the first to work up to their potential and forcing the second to produce meaningful work. However, carefully selecting groups, no matter what the criteria, is not a magic bullet. Putting students together in groups, without proper supervision and advice, “does not, in and of itself, promote higher achievement (Johnson & Johnson, 1990).”

Peer Assessment

Professors struggle with how to evaluate individuals within a group setting. One tool that has been used to help professors with this process is peer assessment, asking group members to grade each others’ performance. Dyrud (2001) credits peer review with mitigating dysfunctionality in groups, improving productivity and leading to a fairer assessment of individual’s work. However, research findings on the value of this measurement tool, are mixed, with some reporting success (Aldridge, 1996; Martinazzi, 1997) and others indicating problems (Rafiq, 1996; May & Gueldenzoph, 2006) or mixed results (Kruck, 2001). Peer assessment is critical in allowing the professor a window into the inner workings of the student team. Without such assessment, the professor has only his/her observation of group dynamics and no feedback from individual team members. Research reveals that feedback is positive and often constructive among well-functioning teams and negative and blaming for those dysfunctional teams (Kruck, 2001).

Client-Based Projects: Cases

A Case Study from one university business school

Two marketing planning courses exist at this university: an undergraduate marketing capstone course, Marketing Plans Development, and a graduate Marketing Management course in the MBA program. Both make use of the development of client-based marketing plans as the major component in the learning process. The courses are similar in a number of ways due to the nature of the assignment but different in other ways owing to the level of the student (graduate v. undergraduate) and the teaching styles of the professors.

Similarities include both projects being:

- group-based, consisting of 4-6 students, with a pre-determined client
- semester-long
- a significant part of the student’s grade (100% for the undergraduate course and 80% for the graduate course)
- iterative, entailing multiple submissions of the marketing document
- feedback driven, professor to student, student to student, and client to students
- peer graded, which forms a significant portion of the final grade

Differences involve:

- handling of group dynamics
- contact with client
- approach to problem of social loafing
- role of students and client in the grading process

Course Differences

The authors have found that the role of the teacher is critical to the success of their client-based projects as the professor is the one who recruits and selects appropriate clients, communicates expectations for the student teams and clients, and coaches the teams during the semester. However, the authors approach this role differently. The undergraduate professor takes a more active role in the dynamics of group interaction. This entails working with problem groups and meeting with individual group members who are not performing up to the expectations of their group. The graduate professor takes a “hands off” approach to the functioning of the group, focusing only on content related issues that may be stalling group progress.

These differences make sense, given the nature of the student. Undergraduate students generally have less experience working in groups and dealing with the conflicts that can develop from such interactions. Alternatively, the majority of the graduate MBA students have been working for a number of years and many are middle managers. Consequently, they have much more experience handling the pitfalls of group work. This experience allows the graduate professor to concentrate totally on the project, an appropriate focus given the higher expectations associated with work at this level. The undergraduate professor, however, must balance issues surrounding the success of the project and the success of the group operation, necessitating less emphasis on each.

All professors face issues of social loafing, but, again, handle such issues differently. At the undergraduate level group members can “fire” unproductive group members with cause and documentation. The professor meets with the group and the “fired” student to clarify issues and set ground rules for the future. “Fired” student must then produce a marketing plan for a client on his/her own.

At the graduate level, students cannot “fire” group members but deal with the issue of social loafing through social pressure and peer assessment. If a graduate student’s group work would result in a failing grade, the professor gives the student the option of taking an incomplete and either writing a research paper or retaking the course the next semester. The different approaches, to group membership-retention, recognize differences in the ability of graduate and undergraduate students to be productive in stressful group situations.

Regarding the client, the graduate professor has found it helpful to attend the initial meeting the students have with the client because this gives a better sense of the client’s expectations. This has helped tremendously in guiding students through the project and ensuring that all relevant topics are covered in the client meeting. The undergraduate professor meets the client alone first to explain the project, guide expectations, and assess needs (an effort to ensure client suitability). The undergraduate course professor then allows student teams to hold initial fact-finding meetings without her presence. This is less a pedagogical difference than a time difference, undergraduate classes are larger, requiring more teams.

Grading of both projects is a combination of the professors’ assessments of project quality and student contributions and peer assessment of group members. However, the student’s ability to function in a group is taken into account at the undergraduate level whereas that is not a factor in graduate grading.

The role of the client in assessment is more formal at the undergraduate level, with the client actually providing the professor with formal feedback [not a grade] for the project according to certain criteria. The client’s assessment is more informal for the graduate class where the client provides oral comments after the project presentation. The “kindness” of clients when asked to assess project quality is the reason for the informal process at the graduate level.

Students at the undergraduate level sit in on all project presentations and are asked to rate the projects according to predetermined guidelines. This gives the student a chance to learn from their peers. However, at the graduate level groups present only to the client and the professor. This is necessary at this level because the client may be asked to provide sensitive information about his business involving confidentiality issues.

Course Similarities

While there are differences in how the graduate and undergraduate marketing classes approach the project, there are also important similarities. The objectives for the projects are the same: to teach students how to formulate a marketing plan that can be used in an existing business or organization. In addition, the professors at both levels clearly communicate the expectations for the course to both the students and the client. The students are given a detailed outline, timeline and handouts that address each component of the marketing planning process.

The authors consider the ability to formulate such a plan to be so important that the whole semester is devoted to it and the final grade is dependent solely on how well the students accomplish that task. In addition, the authors take a developmental approach to learning. Students are given multiple opportunities to “get it right.” Iterations of the project are turned in throughout the semester and the professor gives substantial feedback, both in writing and in person, to improve the next submission.

In both courses, student groups are self-selected. At the undergraduate level, the client is then assigned to a team whereas at the graduate level, students choose a project from a list submitted by the professor. If more students choose a project than there are slots available, students either volunteer to switch to another project or the professor randomly selects “volunteers” by drawing names from a hat. Students are given time in class to meet with their groups at both the graduate and undergraduate level. This allows the professor to observe group dynamics and to chart the progress of the groups. Clients represent area small businesses. A client is typically one who has called the College of Business, requested a marketing plan, and been vetted by course professors [deemed a “client lead”]. If a client lead exists, it is given priority. If no client lead exists, the professor may cold-call area small businesses to gauge their willingness to participate or allow student teams to suggest a particular small business.

The grading process for both courses involves the marketing plan being subdivided into three gradable components (see Appendix): a project Proposal (¼ of the overall grade); a Situational Analysis - market analysis with secondary and primary research (¼ of the overall grade); and the Final Marketing Plan (½ of the overall grade). At both levels, prior to a component’s due date, the course professor allows teams to submit the assignment for review where the professor provides greater direction and extensive feedback. Each component, listed above, is handed in for a grade that is accompanied by copious feedback. Student teams must revise the graded component based upon feedback from the professor; this process of revision may take several iterations until that particular graded component is deemed complete by the professor. Further iterations by student teams are not graded; they are a course requirement that demands writing refinement by students as well as continuous and persistent feedback by the course professor. Each graded component becomes part of the overall marketing plan. Students at both levels are asked to assess members of their groups, fostering individual accountability and giving the professor insight into student team contributions. This cumulative feedback may be used by the professor to grade one team member lower/higher than the whole at final grade time. The quality of the graded output varies by team, but the finished products are often quite good, due in majority to the iterative approach to writing which improves with each version. The professor, as gatekeeper, is critical as he/she determines when a component piece has been revised to completion. Teams that are struggling will engage in more iterations than others.

Finally, the authors collectively feel a responsibility to provide a superior educational experience for the students and a high quality marketing plan for the client. While the students’ abilities may be different at the graduate and undergraduate level, both courses emphasize that this is not just an exercise but is to be thought of as a consulting job for the client. This is particularly important at small universities in rural areas where consulting help is limited and business resources are scarce. Evaluative feedback from students, at both levels,

illustrates an appreciation for the learning experience. Students positively comment on the value of working with an actual organization, learning from a business owner/operator, and acquiring consulting-type skills. Clients unanimously report an overall positive experience and consider working with students at either level as a chance to give back. Others report never having a marketing plan prior, thus the team's output proves invaluable.

CONCLUSION

Client-based projects can and do work for the professor, students, and the clients. The key is in selecting appropriate clients and devising attainable expectations. This real world-classroom integration should be an enjoyable learning experience for professor and student alike. The professor can dovetail research interests with client-based student projects and students create a living document that may impact an actual business. At a minimum these projects enhance student learning and regional engagement, oft university mission components. The desire of the authors is to provide a framework from which one can venture into the applied projects domain at both the graduate and undergraduate level.

Appendix: Undergraduate course Hand-out Components of the Marketing Plan

- I. Cover Page:
(centered on page)
Marketing Plan For: Client Organization's Name
Date (of completion)
University
College of Business
Professor
Your names (indented, alpha order, at bottom on cover page)
- II. Table of Contents (page number as a Roman numeral)
- III. Executive Summary
A one-to-three page synopsis of your marketing plan that provides highlights of the organization's current [internal and external] operating environment, marketing objectives, strategies, and describes principal action programs and expectations. I.E., the "best" of the marketing plan in a snap-shot ! NOTE: single space Executive Summary section (page numbers for rest of paper begin here: 1, 2...)
- IV. Project Proposal -- Graded Assignment #1
- V. Situational Analysis (Secondary Research) – Graded Assignment #2, part 1
 - A. Internal Analysis
Company (history, mgmt, mission / vision, strengths & weaknesses)
Current Marketing Situation (marketing mix, target, positioning strategy, current marketing actions [promotions], marketing research undertaken, etc.)
Sales/Financial Analysis (sales forecast, profitability, sales reports/records, breakeven, financial statements..)

B. External Analysis

1. Environment (social/cultural, political/legal, technological, economic, opportunities & threats)
2. Industry Analysis (size, growth potential, attractiveness, rivalry, ease of entry, power of suppliers/distributors, stage in life cycle, trends..) -- SIC code --
3. Competitor Analysis (who are they, who are their customers, loyal?, segmentation, resources/profitability, strategies, distinct competency, marketing mix..)
4. Customer Analysis (who is customer? needs, loyalty, buying behavior..)
5. Marketplace Analysis (“local” market demographics, [population], market size and potential, profitability and attractiveness, trends..)

VI. Marketing Objectives (included in Proposal)

Describe the client organization’s marketing objectives as they have voiced them to you: i.e., sales volume and profitability objectives; market acceptance objectives; customer acquisition objectives; customer retention objectives; operation expansion or retrenchment objectives...

VII. Primary Research -- Graded Assignment #2, part 2

- A. Survey Report (executive summary of major survey findings)
- B. Survey Methodology (who, what, where, when of survey process)
- C. Survey Results (all inclusive; results per question & significance)
- D. Blank Questionnaire (for reference purposes)

VIII. Critical Issues (included in Proposal)

Describe the critical issue for the client organization [issue(s) may be taken from proposal and then expanded/adjusted as project has developed over time].

EX. “A critical issue, as described by the client organization, is the lack of repeat customers.

Therefore, it is the clients’ desire to hone a core group of satisfied customers who will come back to them on a regular basis. The issue for the team becomes what is the root cause of customers not returning?”

IX. Marketing Action Plan(s) - recommendations

Describe the action items that your team proposes to meet the clients’ critical issues (Part VIII) and marketing objectives (Part VI) given the situational analysis and primary research (Parts V and VII) that you have completed on the clients’ operating environment.

X. Controls and Timeline

Indicate when implementation of your proposed action items should take place. Include a PERT chart or timeline with specific implementation dates

XI. References

In APA format (see APA Style Guide that I provide), place reference page at the end of your paper. Make sure all references listed here are cited in your paper properly (using end note citations NOT foot notes).

XII. Appendix

Add an Appendix (one item) or an Appendices (several items) at very end of paper to house “noted items” from paper

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