

# **CREATING PROCESSES FOR CLIENT-BASED PROJECTS IN MARKETING EDUCATION**

Nicole Vowles, Alexandra Hutto, Sally Baalbaki, and Darrin Duber-Smith, Metropolitan State University of Denver

## **Abstract**

Although the benefits of client-based projects in marketing classrooms are well established for students, clients, the University, and the instructor, the key challenge relates to the time and energy required of the instructor. This paper provides guidance and tools for instructors who want to apply client-based projects as a form of experiential learning in the classroom. We provide the instructor with five strategies to aid in the implementation of successful client projects. The instructor should select appropriate clients for the classroom, manage these clients' expectations, use templates for all deliverables, establish processes for communication, and be prepared to be flexible. Following these guidelines will enable a long-term, supportable use of client projects in the classroom.

## **Introduction**

The benefits of client-based projects in marketing are well established, as are the challenges. The extant literature includes many benefits to students, clients, the University, and the instructor. One key challenge is the time and energy required of the instructor (Bove & Davies, 2009; Cooke & Williams, 2004; Goodell & Kraft, 1991). This time-challenge creates a risk that client-projects are under-utilized, as instructors tire of the efforts and may become unwilling to offer these beneficial experiences to students. The purpose of this paper is to provide guidance and tools for instructors who would not only like to try this form of experiential learning, but would like to systematically incorporate client-based projects with several clients in one class, and/or work with clients every semester. Previous research includes some best practices for client projects, but emphasize that projects can be incorporated in most marketing courses "from time to time" (Goodell & Kraft, 1991). The focus here is on implementing processes that enable a long-term, supportable use of client projects in the classroom.

The authors have successfully managed past work on well over 100 client-based projects at a mid-western urban, commuter university. The authors represent a range of client-based marketing coursework. One of the authors teaches one to two sections of Marketing Research, with 6 - 7 client projects per class. Another author teaches two sections of a Seminar in Marketing class, with a client project serving as the capstone experience for Marketing Minors.

This course consistently incorporates 7-8 clients per class. In addition, the authors have incorporated client projects in other courses including Advertising Management, Social Marketing, and Brand Management.

### **Benefits of Client-based Projects**

The beauty of client-based projects is that, if executed well, all parties benefit. Here are some highlights: Students gain “real world” practical experience that can augment their portfolios and give them wonderful talking points in job interviews. Clients may access fresh no- or low-cost insights that may have been out of reach otherwise. The University builds its reputation organically through the efforts of its students and faculty. And, finally, instructors are reinvigorated through the constantly renewing resource of new projects and fresh insights.

#### **Students**

Student learning is the primary goal of client-based projects, and should be the key outcome. Previous research shows that students experience an increased motivation to learn the course material; students also state that they remember the course concepts better as a result of the applied learning (Goodell & Kraft, 1991) and they tend to attend class regularly (Bove & Davies, 2009). Students learn in a number of areas outside of the application of marketing analysis and decision-making. They gain experience with project management and collaboration (Cooke & Williams, 2004) as well as gain practical experience with report preparation and communication with a client (Goodell & Kraft, 1991). Students can also positively benefit by networking with their client. Exceptional students may earn a positive letter of recommendation from a client, or even a personal reference for a job opening.

#### **Client**

Student-led projects can provide small businesses and non-profits with much needed help which they otherwise could not afford. For other businesses, the project could be an opportunity to address a project that would otherwise be forgotten (Cooke & Williams, 2004). Either way, clients gain valuable insights regarding their marketing problem. In addition, clients can enjoy the interaction with students (Bove & Davies, 2009) and perhaps find potential candidates for open positions they may have. Clients also have the opportunity to build a long-term relationship with a University, which can be helpful to them in terms of gaining insight into new marketing problems, recruiting potential employees, and enhancing their sense of social responsibility.

## **University**

Engaging the business community in class projects is beneficial to the University. These sorts of experiences can "build a bridge between academe and the business community" (Goodell & Kraft, 1991, p. 32) that could lead to the businesses recruiting employees on campus or participating in other campus activities. Student projects can also create valuable publicity; this highlights work the University is doing to support economic development (Goodell & Kraft, 1991) and helps build the reputation of all of the stakeholders involved (Strauss, 2011).

## **Instructor**

As an instructor of a course in which you implement client-based projects, you can benefit from interacting with practitioners in your field of study, gaining access to research participants or collaborators, and perhaps most importantly, reinvigorating excitement about teaching. Watching the students apply their skills to a real-world situation can be incredibly rewarding. The key challenge for the instructor, and the one addressed by this paper, is that successful client projects require "much preparation and thought" (Cooke & Williams, 2004, p. 143) and a "great deal of extra work" (Goodell & Kraft, 1991, p. 38).

### **Five Ways to Streamline Client-based Projects**

Client-based projects may reduce the time instructors' spend preparing for lectures, but managing client projects can be time-consuming and challenging. This is especially true when client projects are being implemented for the first time, with no processes in place (Goodell & Kraft, 1991). The challenge becomes exponential if a course includes several smaller teams all working for different clients. Instructors can meet the challenge of client projects by implementing repeatable processes and creating templates for every aspect of the project. The time invested in preparation will save significant time and stress when working with multiple teams and multiple clients over many semesters. Following are five areas that can contribute to a well-planned and repeatable client project experience, leading to better student outcomes and less stress for the instructor.

#### **1. Select the Right Clients**

Finding and engaging the right type of client is critical to the student experience. The process of finding clients can be time consuming; in order to reduce the stress of finding the right clients, start looking for clients early and often. Potential clients can come from a variety of sources;

creating a large pool of potential clients will improve your chances of finding the right fit for your class. Keep your eyes and ears open for client opportunities all year long. Accept business cards and other contacts and file them away for future reference. If you are having trouble locating your own pool of potential clients, reach out for assistance. Your university's internship (or similar) program may be a resource. Think broadly; unfilled internships may be potential candidates for class projects. A local Small Business Development office may serve as a valuable resource as a feeder for clients. Use leads from students in the class to recruit new clients. Also, encourage word of mouth from current clients to recruit future clients. Interest can be created using existing external publications such as an alumni newsletter (Bove & Davies, 2009). Also consider working with on-campus clients; many support organizations throughout the University can benefit from a student-created marketing plan. Know what you are looking for in a client and be prepared to evaluate potential clients to meet your course objectives.

Potential clients can be screened using a template application. This template can be posted on your school's website, capturing information about companies seeking some form of business assistance. The template can also be used to gather information from the contacts you have met throughout the year. This simple tool is an easy way to streamline your client selection process and ensure your goals for the class are aligned with those of the clients'. A sample template is in Appendix 1. In terms of timing, the authors' experience is that applications should be reviewed two to three months before the term begins. This is in line with previous research which indicates that meetings with potential clients should occur a month or two before the class begins (Bove & Davies, 2009).

Two key criteria to consider during the client selection process include the scope of the problem (will the project fit within one term?) and timeline (can the problem wait to be addressed until the end of the project?). The class should ideally be able to complete the project in 8 to 10 weeks (assuming a 15-week semester), in order to provide time for introductory materials (Cooke & Williams, 2004), planning, and contingencies. In addition, the project should be actionable (will the clients actually use the work?). This creates urgency for the students and captures their attention (Goodell & Kraft, 1991). When students feel that their ideas could be put to use, they are more likely to be highly engaged in the project.

## **2. Manage Client Expectations**

After screening potential clients, the next step is to meet with them to discuss the projects and expectations. Do not be afraid to ask your client to fulfill certain conditions such as presenting

**Table 1: Example Contents of a Mid-Project Checkpoint**

- |   |
|---|
| <ul style="list-style-type: none"><li>• Project overview and accomplishments to date</li><li>• Best practices analyzed for project</li><li>• Key ideas</li><li>• How we plan to complete the project on-time with a high-quality plan</li><li>• Questions for client and instructor</li></ul> |
|---|

their business situation to the students early in the semester and returning to hear the students present their results. The first presentation is critical to starting the project, as it reinforces to the students that the work they will do is important and will be used (Cooke and Williams, 2004). Client participation throughout the semester will vary depending on the topic and the project. For example, for a marketing research class, the client should be expected to review surveys, provide incentives for survey participants, and provide a database of potential respondents. For any class a mid-project client check-point can ensure that the students are meeting the client's expectation and have the information they need to proceed (see template, Table 1). Regardless of your expectation of the level of client involvement, the details should be discussed and put in writing at the outset to avoid misunderstandings.

In addition to ensuring the client knows what you expect of them, they need to be prepared for what to expect from the students. The quality of student work can be widely varied; clients need to understand that "students are learners, not consultants" (Strauss, 2011, p. 318). Clients should be encouraged to provide honest feedback to the students throughout the project, as a critical part of the learning process. While some authors recommend charging a small fee to add credibility to the project and value in the eyes of the client (Goodell & Kraft, 1991), the authors of this paper recommend not charging for the project lest you overpromise and under-deliver, which is probable. If the clients are highly satisfied, they may choose to make a donation to the University or the Marketing Department at the end of the project.

If you develop a solid relationship with a client, consider repeating a project with him/her in the future—either a similar project for the same course in the subsequent term or a different type of project in another class. You might be able to assist a client with multiple needs or multiple business units. Working with the same client again will save time in the preliminary stages of the project and help build strong communication throughout the semester. This long-term relationship building can also provide stronger potential for research collaboration. In addition,

**Table 2: Key Deliverables for a Marketing Plan Project**

Deliverable	Key Components
Proposal	Two-page letter details the deliverables and timeline for the project.
Check-point	Early project update outlines progress and articulates questions for client and instructor.
Mid-project self and peer evaluation	Opportunity to assess group dynamics and ensure open communication among the team.
Draft of written plan	Provides opportunity for instructor feedback.
Final written plan	Full plan to be delivered to client.
Dry run of presentation	Provides opportunity for peer and instructor feedback.
Final presentation	Full plan presented to client.
Final self and peer evaluation	Gives students opportunity to fully analyze each team member's contribution; results should be grade impacting.

this highly-engaged client can grow to be a strong advocate for your program and become involved in your department or school in a variety of ways.

### **3. Use Templates for all Deliverables**

As with any class project, students perform better when they know what to expect. In order to enable students to focus on the core of the project, instructors should reduce their uncertainty around the deliverables. Provide templates for all deliverables and create clear rubrics for how they will be assessed. This will not only save the students time, it will save you time in the feedback and assessment process. The project should be broken into smaller pieces, so that students can receive feedback on their progress throughout the semester. For example, students can use a template for an early check-point with the client and instructor, as previously discussed. A list of potential deliverables for a marketing plan project is listed in Table 2. Spend several classes early in the project reviewing the templates and expectations with the students.

#### **4. Establish Processes for Communication**

As in the workplace, student projects can get off-track as the result of communication problems. Ensure that students have the infrastructure required to facilitate communication. For example, Blackboard discussion groups can be the central source for a team to share ideas and swap drafts of documents. Using this tool also gives the instructor visibility into group progress and communication dynamics. Students may also decide to create their own forms of communication, such as using wiki pages or Google docs. Creating several interim deliverables, as discussed in the last section, also creates incentives for students to communicate with each other early in the process. Have the group appoint a leader who serves as the project manager. Make sure everyone has the chance to evaluate everyone else, perhaps by using a peer evaluation form in the middle and at the end of the project or semester. The instructor should also have contingency plans in place for groups that do experience significant communication breakdowns. Policies for firing team members should be clearly documented.

Lack of communication or miscommunication with clients can also create negative feelings on both sides. The instructor's role is to protect these client relationships. Take time to coach the students on how and when to best interact with the clients. Ask them to designate a point person on each team to interact with the client, and require that they copy you on any client communication. If the entire class is working with one client, set up a clearinghouse where key pieces of information can be disseminated to the entire class efficiently. Let the students know that they are ambassadors for your University and as such they should work to make good impressions with their clients. The students should strike a balance between being overly intrusive and disinterested.

#### **5. Be Prepared to Be Flexible**

While it would be nice to think that everything will occur as planned, given a rigorous planning process, some hiccups are still likely to occur. Clients have schedule changes, students get sick, or the University is closed due to weather. As you plan for the term, be sure to build in a buffer week (or two) to enable you to move things around. Be sure to also manage students' expectations so that they are ready to deal with challenges as they happen. Unlike typical simulated class projects, the instructor cannot control all aspects of the experience, including the client's behavior (Bove & Davies, 2009). Instructors must find ways to translate these unexpected situations into teachable moments (Strauss, 2011). Because each project is

different, each provides a different opportunity for both students and instructors to learn (Cooke & Williams, 2004).

### **Conclusion**

While the benefits of client projects in the classroom are clear, the question is why this approach to learning is not used more commonly (Bove & Davies, 2009). The time commitment and effort required of instructors is likely a major reason. Strauss (2001) notes that managing client projects gets easier over time. This paper discussed five important areas to consider in implementing successful client-based projects. We must first select appropriate clients given the class material, manage client expectations, use templates for all deliverables, establish processes for deliverables, and be prepared to be flexible. By addressing these strategies, this paper guides instructors on how to gain efficiency quickly, with an emphasis on implementing repeatable processes and templates to achieve great learning experiences for students and benefits to clients without over-taxing the instructor.

### **Future Research**

The focus of the extant literature in the area of client-based projects in Marketing is mainly prescriptive, with some measurement of student outcomes. To further progress the recommendations in this paper, future research could empirically compare the time involvement for a project that leverages the recommended processes and templates to a typical client-based project, while also considering the outcomes and experiences of stakeholders. Researchers could also use qualitative methods, such as focus groups and in-depth interviews, to evaluate the experience of students, clients, and instructors who complete client-based project classes using tools to streamline the process.

References available upon request



## Appendix 1: Client Screening Template

Business: \_\_\_\_\_ Contact: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_

Website: \_\_\_\_\_

### Project Description

Current situation/Problem to be solved:

Desired outcome:

Timeline:

What research have you already conducted about this business situation/problem?

What internal resources are available to students that relate to this problem (i.e., budget, customer contact lists)?

How much time are you willing to commit to a student project? Typical projects require meeting with students at the beginning and end of the term, as well as answering student questions within 24 hours and reviewing preliminary work.