HARVARD BUSINESS SCHOOL

CASES

MBA核心课案例教学推荐教材

Marketing Management

(Reprint)

营销管理

（英文版）

案例选编 John Quelch教授

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出版说明

随着 MBA 教育逐渐走向成熟，人们对于案例教学已不再陌生，很多院校，特别是首批 MBA 试点院校已经比较普遍地采用案例教学这种模式。案例教学、案例编写也成为全国 MBA 教学指导委员会十分重视并大力推广的重要工作。为满足教学需要，中国人民大学出版社与哈佛商学院出版公司达成了引进出版哈佛商学院案例的协议，围绕 MBA 教学选择了十门课程，包括：战略管理，人力资源管理，营销管理，公司财务管理，领导学，组织行为学，供应链管理，技术与运营管理，财务报告与控制，企业、政府与国际经济，中文版和英文版同时推出。先由哈佛大学教授从其数千个案例中进行选择、推荐，再由中国教授从推荐的案例目录中遴选，在翻译的过程中又作了进一步的调整，最终确定了目前的案例。

多年来，中国人民大学出版社一直在不懈地打造经管类图书的品牌，特别是，作为高等教育教材出版的市场领先者，我们一直希望能为中国的管理教学和实践提供更多、更好的产品。随着中国 MBA 市场规模的扩大，学生人数的增加、素质的提高，教师队伍的成熟，我们发现，案例教学教材的数量不足及质量不高成了一个比较大的问题，基于大量的市场调研，哈佛商学院的案例便成了我们针对 MBA 教学引进案例的首选。毕竟，哈佛大学是最早开始 MBA 教育的，其 MBA 学位计划有近一百年的历史。哈佛案例每年能销 600 万份，其案例教学法也在逐渐为世界上各大学校所熟悉和借鉴。作为一家以为高等教育服务为己任的大学出版社，我们深感哈佛案例的引进对于我国工商管理教育理论和实践的提升具有十分重要的意义，事实上，我们在 2002 年曾引进出版了一套哈佛商学案例，分商务基础系列和实务系列，共 21 种，在当时引起了很大的反响，只是囿于条件，案例没能根据课程设置选取，不便于教师在教学中使用，基于此，便有了我们这套针对 MBA 核心课程的案例。

在运作这套案例的过程中，我们广泛听取了老师们的意见和建议，我们发现，单是引进一些案例并出版不能满足教学的实际需要，对于很多老师来说，如何讲授哈佛案例才是一个难点。同时，我们在前期调研和筹备工作中也深感案例的推广不再局限于传统意义上的图书推广工作，它已超出了传统单纯出版图书的概念，变成了一种教学理念和教学方法的推广，它需要我们提供更多、更长期的后续服务，并改变传统的出版模式。

就在我们策划出版这套案例书之际，哈佛商学院酝酿已久的 PCMPCL (Program on

Case Method and Participant-Centered Learning）培训计划正式启动。为配合 PCMPCL 项目，哈佛商学院出版公司邀请包括中国大陆、香港、台湾等地区和新加坡在内的 16 所大学的商学院选派一些教授到哈佛商学院参加哈佛案例教学的培训。首次培训定于 2005 年 8 月，同年 12 月还将在中国举办第二期有关案例教学与写作的培训。

同时，为帮助广大教师更好地使用哈佛案例，中国人民大学出版社还将配套引进案例的教师用书、教学录像等辅助资料（出于授权限制，仅向使用本案例教学的教师提供）。在案例出版后，我们还将提供教学支持，帮助中国教师更好、更便利地使用案例。

运作案例出版的过程是艰苦的，但结果是美好的、令人难忘的。在和哈佛商学院出版公司的合作中，我们一次又一次地听到他们虔诚地谈及他们的使命：改善管理实践。在案例出版的过程中，很多人做了辛苦的工作，我们感谢哈佛商学院高级副院长、贝克基金教授史蒂文·C·惠尔赖特（Steve C. Wheelwright）先生，他为我们的案例出版写了序，他在这套案例书 10 门课的选择中起了决定性的作用，没有他的努力，这套书的出版是不可能的。感谢 John Quelch、Michael Tushman、Debora Spar、Pankaj Ghemawat、David Hawkins 以及 David Upton 等教授，他们在我们初选案例的过程中给予了建议和指导；感谢哈佛商学院和哈佛商学院出版公司的下列人员，他们为案例的挑选做了许多工作：Paul Andrews、Tim Cannon、Tad Dearden、Mike Derocco、Pat Hathaway、Amy Iakovou 和 Carol Sweet；感谢哈佛商学院出版公司国际部总经理陈欣章先生，他促成了案例最终出版协议的签订和执行，并完成了整个过程中的协调工作。最后，也要感谢所有参加案例中文版翻译的教授，他们都有自己繁重的教学任务，在出版时间紧迫的情况下，各位教授都保质、按时地完成了翻译工作。

我们希望这套案例书的出版以及后续的培训工作能影响几百、几千乃至上万个 MBA；我们希望他们能用一种新的视角，适应国际化的大趋势，理解现代企业的管理方法，理性地接受信用经商的理念，推动中国经济的更大发展；我们希望能通过我们的出版物来引导中国的管理实践。如能做到此，那么其间的各种辛苦努力也就值得了。

感谢您选用或关注我们的这套案例书，对您的任何反馈我们都十分珍视。我们的联系方式：010-62510566 转 551 或 541；E-mail: rdcbsjg@crup.com.cn 或登录：http://www.rdjg.com.cn。

中国人民大学出版社

2005 年 7 月

序

“培养世界上有影响力的领导人”是哈佛商学院的使命。1908年，哈佛商学院正式成立。为实现这一使命，哈佛商学院通过实施各种项目，影响众多不同的人。哈佛商学院最出名的可能是其MBA项目，但同时我们也通过开展高级管理人员培训项目(Executive Education Program)（包括AMP项目以及其他逾100个为职业经理人开设的各种培训项目）和通过哈佛商学院出版公司的出版物追求我们的使命。我们的出版物包括《哈佛商业评论》、哈佛商学院图书、网络课程，以及哈佛商学院案例研究。

为杰出院校提供建议也是我们使命的一个重要方面。在过去的60年里，哈佛商学院为世界上许多院校不仅提供了教学案例，还通过各种项目帮助他们及其教师提升了自己的案例教学能力。包括：国际教师项目（ITP)、以参与者为中心的教学法培训项目（CPCL)、案例教学与以参与者为中心的教学法培训项目（PCMPCL)。其中，PCMPCL项目发起于2005年8月，其目的在于帮助中国大陆、香港、台湾等地区和新加坡的主要商学院提升其在MBA项目、高级管理人员培训项目以及以管理实践为导向的研究中，熟练运用案例教学和启发式教学的能力。

通过多年的实践，哈佛商学院发现案例教学的应用通常需要经历三个阶段。第一阶段，案例在管理学课堂上是作为概念或原理的例子、说明来使用的。第二阶段，将案例研究作为主要的学习方法，依靠案例讨论。第三阶段，教授开始把他们在案例研究和课程发展上取得的成果大量应用于教学，以便更好地理解和传授如何做决定。

为实践我们的使命，哈佛商学院和哈佛商学院出版公司很高兴与中国人民大学出版社携手帮助中国商学院及其教授实现从第二阶段向第三阶段的跨越。我们的努力包括：为来自中国大陆、香港、台湾等地区和新加坡的教授提供为期10天的PCMPCL培训；出版一套根据MBA核心课编辑的案例书（分中文版和英文版)；组织一系列后续服务的案例教学和案例写作的培训班；建立一个服务于中国教师的案例服务中心。

我们这样做的目的有两个，并且这两个方面都与哈佛商学院的使命紧密相连。一

个目的是通过帮助全球教育机构——正如我们在中国发现的那些机构一样——发展他们自身的、着眼于管理实践的案例教学能力，从而促进全球管理教育水平的提高。另一个目的是帮助这些机构培养一些能够在他们的学校中起到带头作用的教师，使他们能够写出新的、能够与世界分享的案例研究和教学资料。这种既符合国际标准，又与中国具体管理实践相关的案例研究正是中国管理教育机构所急需的。

我们很高兴中国人民大学出版社和中国许多优秀的商学院加入我们的队伍。我们希望哈佛案例书在中国的出版能对中国的教育机构、教师及其培养的未来职业经理人有所帮助，帮助他们实现在全球经济中扮演重要角色的梦想。

史蒂文·C·惠尔赖特（Steven C. Wheelwright）

哈佛商学院高级副院长，贝克基金教授

2005年6月

PREFACE

The mission of the Harvard Business School (HBS) is "to educate leaders who will make a difference in the world." Founded in 1908, when Harvard University was already more than 250 years old,HBS achieves this mission by reaching a wide range of audiences through a variety of programs. While HBS is perhaps best known for its MBA Program, it also pursues this mission through its Executive Education Programs (including the Advanced Management Program as well as over 100 additional programs for practicing managers)and through the publishing activities of Harvard Business School Publishing (HBSP) which include Harvard Business Review, HBS Press (books), E-Learning products, and HBS Case Studies.

Providing guidance for leading academic institutions continues to be an important aspect of the HBS Mission.Over the past 60 years,HBS has not only made its case studies available throughout the world, but has assisted other Universities and their faculties in developing their ability to teach by the case method.This has included the offering of such courses as The International Teachers Program (ITP), Colloquium on Participant Centered Learning (CPCL) and the Program on Case Method and Participant Centered Learning(PCMPCL). The PCMPCL Program initiated in August of 2005 is aimed at helping leading Business Schools in Greater China and Singapore to develop excellence in the use of the case method and participant centered learning in both MBA and Executive Programs, as well as in practitioner-oriented research.

HBS has discovered over the years that adoption of the case method often proceeds through three stages. The first stage is where cases are used as examples and illustrations of principles and concepts being taught in a Management Course. The second stage is where cases become a primary means of learning, with a majority of the class sessions in a program relying on field-based cases. The third stage is then where the faculty begin doing significant amounts of their case -based research and curriculum development to better understand and teach about decision making.

Consistent with our mission, we at HBS and at HBS Publishing are pleased to offer—in conjunction with our partner, China Renmin University Press—a comprehensive approach to Chinese Business Schools and their faculty, that is focused on helping them progress through the second stage of participant–centered learning and into that third stage. This overall effort consists of offering the 10-day PCMPCL Course to teams of business school faculty from Greater China and Singapore, providing a series of case books (through China Renmin University Press) tailored to the Ministry of Education's MBA curriculum recommendations, offering a set of follow–up case teaching and case writing seminars in China, and establishing an academic support center to assist faculty with their unique course and case requirements.

Our purposes in doing this are two–fold, but both are directly tied to the HBS Mission. One purpose is to facilitate better management education throughout the global economy by assisting leading educational institutions—such as those found in China—in developing their capabilities in practitioner focused, case based teaching. The other purpose is to help the leadership at such institutions to develop a critical mass of faculty who can lead the efforts of their own institutions in creating additional case-based teaching and research materials that can be shared with other parts of the world. Such China-specific management materials of a world class caliber are anxiously needed by academics elsewhere in the world.

We are pleased that China Renmin University Press and so many leading Chinese Management Schools would join with us in pursuit of these purposes. We anticipate that this series of case books will be a significant contributor to the pursuit of the important role that Chinese Educational Institutions, their faculty, and the practitioners they serve will have in the global economy.

Steven C. Wheelwright
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Senior Associate Dean, Publication Activities
Harvard Business School
Harvard University
Boston, Ma 02163
June 2005

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E. RAYMOND COREY

Marketing Strategy—An Overview

A **strategy**[1] is a plan of action designed to achieve certain defined **objectives**. In business firms, objectives may be stated in such terms as sales volume, rate of growth, profit percentages, market share, and return on investment (ROI), among others. The importance of defining objectives to give purpose and direction to strategies cannot be overestimated. How can we formulate useful strategies in any domain unless we know what we are trying to accomplish?

Strategies are developed at multiple levels in the organization—corporate, divisional, business unit, and departmental. Taken together, they form an integrated plan for the enterprise as a whole. Thus, corporate strategies are the sum of business unit strategies plus any plans for new business initiatives.

At the heart of any business plan is its **marketing strategy**. Businesses exist to deliver products and services to markets. To the extent that they serve this purpose well and efficiently, they grow and profit. Other components of a business unit strategy (e.g., finance, production, and R&D) must support the business's marketing mission. By the same token, marketing objectives and strategies have to be formulated to take account of the firm's core competencies as well as its resource limits.

Elements of Marketing Strategy

A marketing strategy is composed of several interrelated elements. The first, and most important, is **product/market selection**. What markets will we serve with what product lines? A second critical element is **price**. What prices will be set for individual products; how will products in the line be priced relative to each other; will we offer quantity discounts, deferred payment plans and/or rental options; what kinds of price promotions will be needed to compete effectively?

Another is **distribution systems**: the **wholesale** and **retail channels** through which our products and services move to the ultimate users. These may include such business entities as the company's salesforce, independent distributors, agents, and franchised outlets. **Market communications**, a fourth element in marketing strategy, includes such components as print and television advertising, direct mail, trade shows, point-of-sale merchandise displays, sampling, and telemarketing.

[1] Words and phrases often used in marketing are noted in bold letters when they first appear.

Professor E. Raymond Corey prepared this note as the basis for class discussion.

Depending on the nature of the business and its markets, the marketing strategy may include other elements. A company whose products need repair and maintenance must have programs for **product service**. Such programs are often business units themselves with extensive repair shops, service personnel, and spare parts inventories. The product service program is usually expected to make a profit, but in addition, its cost, quality, and availability are usually a part of what the buyer would evaluate in making the purchase decision. It serves, then, as part of the overall marketing program to differentiate the product offering. **Technical service** may be part of the ongoing buyer/seller relationship. Done well, this and the supplier's viability can be important elements of its competitive advantage.

In many enterprises, **plant location** is a critical strategic component. If the product can be economically shipped only within a limited distance of the plant and/or if the product is **customized** to buyers' specifications, plant location may effectively define the geographic market boundaries. Metal containers and corrugated boxes are examples. Or if government regulations require local manufacturing, plant location choices amount to country-market selection decisions.

The combination of these several factors, and others, and the relative emphasis on each in a marketing program is called the **marketing mix.**[2] It varies considerably from one product/market to another and over different stages of market growth. Some firms, for example, may rely primarily on heavy **television advertising**, others on **direct mail**, and still others on a technically trained **salesforce**. The marketing mix may vary even among competitors selling the same products in the same markets. **Consumer packaged goods** manufacturers, for example, such as Kellogg or Proctor & Gamble, advertise extensively to move their products through distribution channels and off supermarket shelves. By comparison, many retailers, such as Osco Drug, Wal-Mart, or A&P, sell the same products at much lower prices under their own **private brand labels**, with little or no advertising.

The discussion that follows considers four primary elements in any marketing mix: product/market selection, pricing, distribution, and market communications. A final section presents a model for strategic planning.

Product/Market Selection

The most important choice made by any organization, whether a business, school, hospital, or government agency, is deciding what markets it will serve with what products. Product/market selection decisions commit the firm to particular customer groups, specific fields of technology, and a certain competitive milieu.

By way of definition, a product is the total package of attributes the customer obtains when making a purchase. Product benefits might include what the product does, manufacturer and retailer **warranties**, repair service, technical assistance, the value of the **brand name** in terms of implied product quality and reliability, assurance of ongoing product availability, and the personal relationships that may develop between the buyer and the seller. A watch, for example, is an instrument for telling time. It is also a piece of jewelry, and some watches—Rolex, for example—may serve as status symbols. In addition, part of the product's meaning may be convenience and/or the pleasure of the shopping experience.

---

[2] The concept of the marketing mix is credited to Professor Neil H. Borden, a member of the Harvard Business School faculty. See Neil H. Borden, "Concept of the Marketing Mix," HBS Case No. 502-004, Harvard Business School Publishing, Boston, MA 02163.

Any list of product attributes may include negatives, as well. In the case of cars, repair frequency and cost may, indeed, be negative factors. A family on a vacation tour inevitably takes risks on the tour provider's performing to the expectations it created in the advanced billing, and often on the weather. Industrial buyers may run the risk of poor product performance or the supplier's going out of business. Thus, product meaning must be defined in terms of the full range of benefits, risks, and disadvantages the buyer obtains with purchase and use, including the buying experience.

Regardless of what the seller thinks of the product, what counts for strategic planning purposes is the prospective purchaser's opinion and the value he or she places on the seller's product versus competitive offerings. It is important to distinguish, however, between **perceived value** and **potential value**. The first is the customer's existing perception of the product. The latter is what the buyer can be educated to recognize. The realization of potential value is accomplished through **market communications**.

As for the term **market**, it may refer to a place where buyers and sellers meet, or to a **retail outlet**, or to a set of potential customers. For purposes of this discussion, a market is a pocket of latent demand. It may be likened to a vein of ore in the ground, available to be mined. New market opportunities may arise from a wide range of exogenous factors. A major source of new market opportunities is new technology in such fields as electronics, aerospace, and the medical sciences. Population growth and increases in national and personal incomes also create new markets and expand existing ones. Societal needs such as crime prevention, health care, and population control also create new markets. Shifts in culture, style, and public tastes in food, clothing, entertainment, the arts, and travel lead to new market opportunities, as well.

Market Segmentation

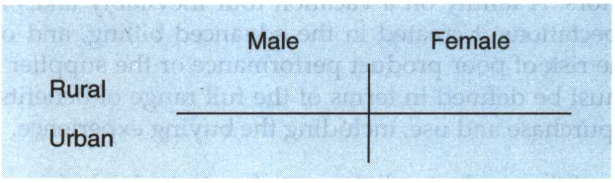
Markets can be delineated in terms of segments. A **market segment** is a set of potential customers alike in the way they perceive and value the product, in their buying behavior, and in the way they use the product. Defining relevant market segments is the first step in product/market selection. It creates a framework for developing market strategy. Markets may be segmented along several dimensions:

Demography Demographic segmentation relies on such factors as family income, age, sex, ethnicity, and educational background as explanatory variables for differences in taste, buying behavior, and consumption patterns. For example:

> When Population Services, Inc., a not-for-profit organization, undertook the marketing of condoms and oral contraceptives in Bangladesh, it found significant differences in buying behavior among males and females and among rural and urban dwellers. Based on these differences, PSI used as a strategic framework a four-quadrant matrix, as depicted in **Figure A**, to address distinctions among these segments in product meaning and the buying influences to which each responded. Different communication strategies were developed for each one.[3]

[3] V. Kasturi Rangan, "Population Services International: The Social Marketing Program in Bangladesh," HBS Case No. 586-013, Harvard Business School Publishing, Boston, MA 02163.

Figure A



In industrial markets, the size of the enterprise, its nature (e.g., for-profit, government, nonprofit) and type of industry (e.g., manufacturing, services, defense, construction) are demographic variables. They tend to explain patterns of **buying behavior**. For example:

> IBM, in selling mainframe computers, organized its marketing programs in terms of such customer categories as Health and Education, Banking and Finance, Government, Manufacturing, Distribution, and Airlines. Computer usage, buying behavior, and service needs were deemed to vary enough among these segments as to justify specially trained IBM sales and service units serving each one.

Geography Geographic segmentation frameworks are useful in both consumer and industrial markets. Different areas of the country and different parts of the world may vary significantly in terms of market potential, competitive intensity, product-form preferences, and government trade regulations.

Another geographic variable is economical shipping distance. In the case of high weight- or bulk-to-value products, plant location, as noted earlier, will define the market area. Similarly, the desire of the customer to be close to the supplier, as in the case of customized products and services—such as health services or restaurants—may effectively limit the market geographically.

It should be noted, however, that with the increasing globalization of markets, geographic segmentation variables have declined somewhat in importance versus others. Product uses and preferences and buying behavior across the world are coming to exhibit greater commonality. Advances in communication and transportation have also eased geographic market limits.

Psychographic variables So-called psychographic typologies attempt to segment markets according to individual lifestyles and attitudes toward self, work, home, family, and peer-group identity. "Senior citizens," for example, may vary markedly from the "baby-boomer" generation, and from "teenagers" in their needs for products and services, political persuasions, and residential preferences and, thus, comprise a distinct and very high-potential market segment. Working women and homemakers, "couch potatoes" and "exercise freaks," people of different ethnic origin exhibit such significant differences in product wants and responsiveness to different buying influences as to comprise different market segments.

The comparable segmentation variable in industrial sectors might be **corporate culture**. Some enterprises are greater risk takers than others and may have more to gain as **early adopters** of new products and technologies, while more risk-prone firms are found among the followers. Some firms focus intensely on price factors in making purchasing choices while others give priority to developing long-term relations with suppliers based on technical and service contributions.

Product application and use The way industrial purchasers use the product and how it fits into their processes and systems may provide the basis for market segmentation. For example, the technologies for manufacturing nylon carpet, or hosiery, or cordage, or synthetic fabrics vary considerably one from the other, accounting for significant differences in product specifications and in technical service needs.

A consumer who buys tableware for his or her own use or as—say—a wedding gift may well have different preferences with regard to price levels, retail source, and brand name for each of these purchases. Thus, any one consumer may exhibit different purchasing behavior in buying comparable products if they are intended for different purposes.

It is also important to recognize that the market segmentation scheme appropriate at one stage in the development of a market may become obsolete with market growth and maturation. Customers become educated in buying, evaluating, and using the product. Demand increases, and new competitors enter. New product forms are introduced, and new distribution channels emerge. Such events change the way people buy and lead to much more elaborated market segmentation structures. Not to continually revisit the task of segment delineation and look for new market opportunities is to lose touch with the market and to risk significant loss in competitive position.

Market segmentation is an art, not a science. Its purpose is to delineate groups of potential buyers according to their needs, market potential, and buying behavior. In the context of a firm's overall strategy, some segments may be defined demographically, some geographically, some in terms of lifestyle and corporate culture, and some in accordance with product application. Some may be defined as subsets of other variables. Having developed a segmentation scheme, strategic planners may select from among these those markets the firm may serve most creatively and profitably, and to develop strategies for each. **Figure B** lists useful segmentation variables.

Figure B Segmentation Variables

Demographic

Consumer
- family income, age, sex, ethnicity, education level

Industrial
- enterprise size, type, buying processes

Geographic

Product preferences, trade regulations, market potential, competition

Economical shipping distance, customers' source-proximity needs

Psychographic

Consumer lifestyle
- attitudes toward self, work, family; peer-group identity

Corporate culture
- tolerance for risk-taking, buyer/supplier relationship values

Product use and application

Consumer
- purchase purpose

Industrial
- application technology

Product/Market Selection Criteria

In making product/market choices, a number of factors must be considered:

Product value First and most important, market entry and development efforts must focus on those segments that value the product most highly. Target those applications in which the product or service makes its greatest contribution. If markets are veins of latent demand, marketing resources are best spent on "digging where the dirt is softest" (e.g., where the product is most highly valued).

Long-run growth potential Ultimately market size and profit potential is key. Growth potential estimates should factor in any follow-on market opportunities as well as the one at hand. As in the case of computers and microchips, new technologies often move rapidly from one application to another, and early market entrants may ride the wave of technological progress in the development of new applications.

Resource commitments Product/market choices often commit firms to heavy financial drains not only in marketing costs but also in production facilities and R&D. Can the resources be made available to compete in some high potential market, and does the estimated return on assets justify the investment?

> At one point, early in the development of the computer market, General Electric had entered the race. It soon withdrew, however. Having undertaken other major enterprise initiatives in fields such as aircraft engines, aerospace and defense products, and up against IBM's already massive marketing, manufacturing, and product development programs, GE could not support a major commitment in computers.

Company-product/market fit New product/market opportunities need to be assessed in the context of existing business operations. This raises such issues as these: Will the firm's reputation and brand name be of value? Can the new venture utilize existing manufacturing capacity and distribution systems? Will the proposed offering enhance the company's position with existing customers and its strength in dealing with its distributors and retail outlets? On the other hand, might the new product obsolete or cannibalize the sales of existing product offerings without increasing total profitability? But if we don't obsolete our own products, won't our competitors do it for us? A case in point:

> U.S. car manufacturers dragged their feet considerably in adding compact cars to their product lines out of concern for cannibalizing the sales of their very profitable full-size models. Only after foreign competitors made significant inroads on their markets in the United States and abroad did the domestic manufacturers bow to the pressure of significant losses in **market share** and began making small cars.

In product/market selection it is useful to think of the market as a chessboard, with the squares representing different market segments. Competitors are arrayed over the playing area, each seeking to occupy certain spaces with particular product offerings. It may be that some spaces, previously unrecognized as market opportunities, lie vacant and would be easy to occupy. Some may be filled by weak competitors; they can be attacked. But other squares are solidly dominated by strong competition with superior product lines; proceed at risk. In the race to take segment positions, the advantage often lies with the **first-mover**, the one to get there first. It has the chance to develop **market recognition**, gain customer access, lead technology and end-product development, and achieve **scale economies** in its manufacturing and marketing operations. As primary demand builds,