

英文版

约翰·A. 奎尔齐
罗伯特·J. 多兰
托马斯·J. 科斯尼克



营 销 管 理

教程与案例

正版

哈佛商学院案例教程

Marketing Management Text and Cases

John A. Quelch
Robert J. Dolan
Thomas J. Kosnik



东北财经大学出版社
McGraw-Hill 出版公司

版哈佛商学院案例教程·英文版

营 销 管 理

教程与案例

Marketing Management Text and Cases

约翰·A. 奎尔奇
罗伯特·J. 多兰
托马斯·J. 科斯尼克

John A. Quelch
Robert J. Dolan
Thomas J. Kosnik

东北财经大学出版社
McGraw-Hill 出版公司

图书在版编目 (CIP) 数据

营销管理：教程与案例：英文 / (美) 奎尔奇 (Quelch, J. A.) 等著 .—大连：东北财经大学出版社，1998.8

(正版哈佛商学院案例教程)

ISBN 7 - 81044 - 459 - x

I . 营… II . 奎… III . 市场营销学 - 英文 IV . F713.5

中国版本图书馆 CIP 数据核字 (98) 第 19557 号

辽宁省版权局著作权合同登记号：图字 06 - 1998 - 128 号

John A. Quelch, Robert J. Dolan, Thomas J. Kosnik: Marketing Management: Text and Cases

Copyright © 1993 by Richard D. Irwin, Inc.

This edition is published jointly by McGraw-Hill Book Co. and Dongbei University of Finance & Economics Press, for sale in P. R. China only.

All Rights Reserved.

本书英文影印版由 McGraw-Hill 出版公司和东北财经大学出版社合作出版，仅限中国境内销售，未经出版者书面许可，不得以任何方式抄袭、复制或节录本书的任何部分。

版权所有，侵权必究。

东北财经大学出版社 合作出版
McGraw-Hill 出版公司

东北财经大学出版社发行

(大连市黑石礁尖山街 217 号 邮政编码 116025)

北京万国电脑图文有限公司制版 朝阳新华印刷厂印刷

开本：787×1092 毫米 1/16 字数：1 300 千字 印张：54 插页：2

1998 年 8 月第 1 版

1998 年 8 月第 1 次印刷

策划编辑：方红星

封面设计：曲 子

定价：82.00 元

ISBN 7 - 81044 - 459 - x/F·1142

出版者的话

当今的世界是一个变革的世界，政治体制在变革，经济结构在变革，管理方式在变革，思想观念在变革……从东方到西方，从中国到世界，一切无不处在变革之中。毫不例外，管理教育也正面临着一场深刻的变革。在以 MBA (Master of Business Administration, 通常译为“工商管理硕士”) 教育为主干的应用型管理教育大行其道的同时，一种以经典案例为主要素材、强调培养实务操作能力、反对一味灌输抽象理论的所谓“案例教学法”(Cases Methods) 逐渐取代了传统的管理教学模式，并以惊人的速度风靡全球。

作为世界 MBA 教育发祥地的美国哈佛大学工商管理研究生院 (Graduate School of Business Administration, Harvard University, 通常简称 Harvard Business School, 即“哈佛商学院”), 同时也是管理专业案例教学的首创者和积极倡导者。哈佛商学院经过近一个世纪的发展, 已经无可争辩地登上了全世界 MBA 教育的制高点, 哈佛商学院 MBA 已经成为全球企业管理界一块光芒四射的“金字招牌”。个中原因除了素来坚持严格的学员遴选制度之外, 主要应归功于独具一格的案例教学方法。

毋庸讳言, 我国的管理教育尚处于“初级阶段”, 亟待借鉴发达国家的成功经验, 包括先进的教学方法、权威的教学素材和科学的教学体系。为此, 我们通过多方努力, 终于开通了一条通过合法途径引进哈佛商学院案例教程的渠道, 并及时推出了首批十余种图书。按照预定计划, 我们将在今后两到三年内, 陆续推出哈佛商学院 MBA 其他主干课程案例教程的英文(影印)版和相应的中译版, 以满足国内管理教育尤其是 MBA、经理培训项目 (ETP) 师生和其他有关人士的迫切需要, 为推动我国管理教育改革和向国际接轨的步伐贡献一份绵薄之力。

对于本套系列教材在选题策划、翻译、编辑、出版以及发行工作中存在的缺点和不足, 恳请广大读者不吝指正, 我们在此先致谢忱!

东北财经大学出版社

1998 年 8 月

John A. Quelch is Professor of Business Administration, Graduate School of Business Administration, Harvard University, where he oversees the introductory MBA Marketing course taken by all 800 students each year and chairs the first year MBA curriculum committee. Professor Quelch has published articles in journals ranging from *Harvard Business Review* to *Marketing Science*. He is the (co)author of 10 books including *Ethics in Marketing* (1993), *Global Marketing Management* (1992), and *The Marketing Challenge of Europe* 1992 (1990). He serves as a director of Reebok International Ltd. and WPP Group plc. He is a graduate of Oxford University (BA), University of Pennsylvania (MBA), and Harvard University (MS and DBA).

Robert J. Dolan is the Edward W. Carter Professor of Business Administration and Marketing Area Chairman at the Graduate School of Business Administration, Harvard University. He is editor of the Field Studies section of *Marketing Science*. An expert on product policy and pricing, his work has appeared in leading journals such as the *Bell Journal of Economics*, *Marketing Science*, and the *Journal of Marketing*. His latest book is *Managing the New Product Development Process* (1993). He is a graduate of Boston College (BA) and the University of Rochester (MS and PhD).

Thomas J. Kosnik is a lecturer at Stanford Graduate School of Business and in the Stanford Engineering Management program. From 1985 to 1989, he was an assistant professor at Harvard Business School. Kosnik's research focuses on the design and marketing of information technology-based products and services for global markets. He has worked in design, sales, and marketing roles in the computer software and systems integration industries. He is a graduate of Duke University (BA), University of Virginia (MBA), and Stanford University (PhD).

THE IRWIN SERIES IN MARKETING

Alreck & Settle
THE SURVEY RESEARCH
HANDBOOK
Second Edition

Belch & Belch
INTRODUCTION TO
ADVERTISING AND
PROMOTION
Second Edition

*Berkowitz, Kerin,
Hartley, & Rudelius*
MARKETING
Third Edition

Bernhardt & Kinneary
CASES IN MARKETING
MANAGEMENT
Fifth Edition

Bingham & Raffield
BUSINESS TO BUSINESS
MARKETING MANAGEMENT
First Edition

Bovee & Arens
CONTEMPORARY
ADVERTISING
Fourth Edition

Boyd & Walker
MARKETING MANAGEMENT:
A STRATEGIC APPROACH
First Edition

Boyd, Westfall & Stasch
MARKETING RESEARCH:
TEXT AND CASES
Seventh Edition

Burstiner
BASIC RETAILING
Second Edition

Cadotte
THE MARKET PLACE: A
STRATEGIC MARKETING
SIMULATION
First Edition

Cateora
INTERNATIONAL MARKETING
Eighth Edition

Churchill, Ford, & Walker
SALES FORCE MANAGEMENT
Fourth Edition

Cole
CONSUMER AND COMMERCIAL
CREDIT MANAGEMENT
Ninth Edition

Cravens
STRATEGIC MARKETING
Third Edition

Cravens & Lamb
STRATEGIC MARKETING
MANAGEMENT CASES
Fourth Edition

Crawford
NEW PRODUCTS
MANAGEMENT
Third Edition

Dillon, Madden, & Firtle
ESSENTIALS OF MARKETING
RESEARCH
First Edition

Dillon, Madden, & Firtle
MARKETING RESEARCH IN A
MARKETING ENVIRONMENT
Second Edition

Engel, Warshaw, & Kinneary
PROMOTIONAL STRATEGY
Seventh Edition

Faria, Nulsen, & Roussos
COMPETE
Fourth Edition

Futrell
ABC'S OF SELLING
Third Edition

Futrell
FUNDAMENTALS OF SELLING
Fourth Edition

Hawkins, Best, & Coney
CONSUMER BEHAVIOR
Fifth Edition

Kurtz & Dodge
PROFESSIONAL SELLING
Sixth Edition

Lambert & Stock
STRATEGIC LOGISTICS
MANAGEMENT
Third Edition

Lehmann & Winer
ANALYSIS FOR MARKETING
PLANNING
Second Edition

Lehmann
MARKETING RESEARCH
AND ANALYSIS
Fourth Edition

Levy & Weitz
RETAILING MANAGEMENT
First Edition

Mason, Mayer, & Wilkinson
MODERN RETAILING
Sixth Edition

Mason, Mayer, & Ezell
RETAILING
Fourth Edition

Mason & Perreault
THE MARKETING GAME
Second Edition

McCarthy & Perreault
BASIC MARKETING: A
GLOBAL-MANAGERIAL
APPROACH
Eleventh Edition

McCarthy & Perreault
ESSENTIALS OF MARKETING
Fifth Edition

Peter & Olson
CONSUMER BEHAVIOR AND
MARKETING STRATEGY
Third Edition

Peter & Donnelly
A PREFACE TO MARKETING
MANAGEMENT
Fifth Edition

Peter & Donnelly
MARKETING MANAGEMENT:
KNOWLEDGE AND SKILLS
Third Edition

Quelch & Farris
CASES IN ADVERTISING AND
PROMOTION MANAGEMENT
Third Edition

Quelch, Dolan, & Kosnik
MARKETING MANAGEMENT:
TEXT AND CASES
First Edition

Smith & Quelch
ETHICS IN MARKETING
First Edition

Stanton, Spiro, & Buskirk
MANAGEMENT OF A SALES
FORCE
Eighth Edition

Thompson & Stappenbeck
THE MARKETING STRATEGY
GAME
First Edition

Walker, Boyd, & Larréché
MARKETING STRATEGY:
PLANNING AND
IMPLEMENTATION
First Edition

Weitz, Castleberry, & Tanner
SELLING: BUILDING
PARTNERSHIPS
First Edition

This volume is a substantial departure from the concept on which most other marketing books are based. Here we cover not only the substance of marketing, but also the process of marketing—the activities that marketers perform to satisfy customer needs and to build an enduring, distinctive, competitive competence. Each activity such as strategy formulation, planning, programming and budgeting, and implementation is important in its own right and receives careful attention. We have also endeavored to demonstrate both the unity of the total process and the important relationships among the activities. Understanding the marketing process can leverage the effectiveness of marketing plans and programs.

Any learning process is based on a series of partnerships. Most important among these is the partnership between student and teacher. In the case method, the student assumes much of the responsibility for his or her own development, and the teacher provides the structure and support necessary to the process. A second equally important partnership involves all the students in a class; their interactions and respectful sharing of thoughts and testing of ideas are critical to their growth and development.

In this book, the integration of textual notes and cases represents an equally important partnership. The textual notes provide the structure and nomenclature, while the cases provide the opportunity to apply the principles described in the notes. We believe that the breadth, depth, and integrated nature of this material will ensure its relevance to the student and its rigorous application in the classroom.

Almost all books are cooperative efforts. Because this book contains so many cases, it is more of a cooperative venture than most. Thus, we want to extend our sincere appreciation to a wide range of people, including:

- The many people on the Harvard Business School marketing faculty who have, over the years, contributed to the development of the first-year MBA marketing course, the required course on which this volume is based. They provided us with a heritage of devoted teaching and a tradition of experimentation that enabled us to develop this material.
- Our colleagues in the marketing discipline who have labored to develop and explain important marketing skills and concepts. We are indeed indebted to

the academy for the knowledge we are attempting to disseminate in this volume.

- The administration of the Harvard Business School, and its supporters, particularly those companies who are members of the Associates of the Harvard Business School. Under the leadership of Dean John H. McArthur and the Directors of the Division of Research, the school provided us with the substantial financial resources needed to complete a field-oriented project of this magnitude.
- The editorial and word-processing support functions of the Harvard Business School, which are exceptional because of their competence, quality, and generosity. We are particularly appreciative of the assistance provided by Antoinette Prince and Elisa Morton Palter who were responsible for preparing the manuscript for submission.
- The many companies, anonymous and named, that provided case material. The case method stands and falls on the support of generous organizations who cooperate in the development process.
- Our colleagues in the first-year marketing course since September 1986 who, in our weekly, four-hour staff meetings, shared their thoughts and helped to develop ours. We are particularly indebted to Professor Robert D. Buzzell who developed the initial concept of the marketing process as used in this book. This concept was carefully and constructively nurtured and improved by many members of our teaching group.
- Our students who also shared their thoughts with us and who, in the process of their own education, added immensely to our development and to the evolution of the concepts and material in this book.
- The many research assistants and others who contributed to the development of the materials included in the book and who are noted with sincere gratitude in the table of contents and on the title pages of their individual works. No group of three people could have developed such a wide range of high-quality material alone.
- The authors also gratefully acknowledge the editorial support at Irwin of Steve Patterson, senior sponsoring editor, Lynn Nordbrock, editorial coordinator, and Paula Buschman, project editor. We also note the effort put forth by Thelma Prince, proofreader.
- Our loving families, and particularly Joyce Huntley Quelch, Kathleen Splaine Dolan, and Jill Summerbell, who provided us with the confidence to start and, more important, the patience to complete this work. We dedicate this volume to them with great and sincere appreciation.

John A. Quelch
Robert J. Dolan
Thomas J. Kosnik

Overview 1

- An Introduction to Cases 3
Benson P. Shapiro
- An Introduction to Marketing 5
Benson P. Shapiro, John A. Quelch
- Basic Quantitative Analysis for
Marketing 14
Robert J. Dolan

PART I

THE MARKETING MIX 23

Introduction

- The Marketing Mix 25
Benson P. Shapiro
- Hurricane Island Outward
Bound School 32
Thomas V. Bonoma, Bruce H. Clark
- Dominion Motors & Controls, Ltd. 44
E. Raymond Corey
- MEM Company, Inc. 50
John A. Quelch

Communications Policy

- Communications Policy 65
Stephen H. Star, John A. Quelch

A. Mass Communications

- Sunkist Growers Inc. 78
Stephen A. Greyser, John A. Quelch

- Reebok International Ltd. 92
John A. Quelch, Tammy Bunn Hiller
- The Massachusetts Lottery 111
N. Craig Smith, John A. Quelch, Ron Lee
- British Airways 118
John A. Quelch

B. Personal Selling

- Waters Chromatography Division: U.S.
Field Sales (A) 137
Thomas V. Bonoma, Shirley M. Spence
- MCI Telecommunications Corporation:
Vnet (A) 151
Frank V. Cespedes, Joe E. King
- Petite Playthings, Inc. 1984 (A) 165
Benson P. Shapiro

Pricing Policy

- Pricing Policy 169
Robert J. Dolan
- Computron, Inc. 177
Benson P. Shapiro, Ralph Sorenson
- Cumberland Metal Industries: Engineered
Products Division, 1980 180
Benson P. Shapiro, Jeffrey J. Sherman
- Federated Industries (A) 190
Robert J. Dolan
- Hartmann Luggage Company:
Price Promotion Policy 199
John A. Quelch, Penny Pittman Merliss
- Workbench Pricing Strategy 217
Gwen Ortmeier, Walter J. Salmon

Product Policy

- Product Policy 237
 - John A. Quelch
- Suzuki Samurai 245
 - John A. Quelch, Tammy Bunn Hiller
- Ford Motor Company: The Product Warranty Program (A) 267
 - Melvyn A. J. Menezes
- The Black & Decker Corporation Household Products Group: Brand Transition 280
 - John A. Quelch, Minette E. Drumwright, Cynthia Bates
- Procter & Gamble: Lenor Refill Package 291
 - John A. Quelch, Minette E. Drumwright, Julie L. Yao
- Chipman-Union, Inc.: Odor-Eaters Socks 304
 - John A. Quelch, Penny Pittman Merliss

Distribution Policy

- Distribution Policy 315
 - Robert J. Dolan
- Lotus Development Corporation 322
 - V. Kasturi Rangan, Thomas V. Bonoma, Douglas R. Scott
- Kraft Foodservice 335
 - John A. Quelch, Mary L. Shelman
- Murrayhill, Inc. 345
 - John A. Quelch, Melanie D. Spencer
- U.S. Pioneer Electronics Corporation 356
 - Hirota Takeuchi, William Falkson
- Pizza Hut, Inc. 376
 - Patrick J. Kaufmann

PART 2:**THE MARKETING PROCESS 389****Marketing Research**

- Marketing Research 391
 - Robert J. Dolan
- Xerox Corporation: The Customer Satisfaction Program 408
 - Melvyn A. J. Menezes, John Serbin
- Boston Fights Drugs (A) 426
 - V. Kasturi Rangan, Jennifer F. Lawrence

- Archdiocese of New York 446
 - Stephen A. Greyser, John A. Quelch
- Chemical Bank: The Pronto System 465
 - John A. Quelch

Marketing Strategy Formulation

- Marketing Strategy Formulation 485
 - Minette E. Drumwright, Thomas J. Kosnik
- Note on the Motorcycle Industry—1975 504
 - Robert D. Buzzell, Nancy Jackson, Dev Purkayastha
- Deere & Company: Industrial Equipment Operations 521
 - Benson P. Shapiro
- Sealed Air Corporation 535
 - Robert J. Dolan
- Sealed Air Corporation: Marketing Impacts of Eliminating CFCs 547
 - N. Craig Smith, John A. Quelch
- Microsoft Introduction: The Introduction of Microsoft Works 559
 - Thomas J. Kosnik
- CIGNA Worldwide 573
 - John A. Quelch, Jonathan D. Hibbard

Marketing Planning

- Marketing Planning 591
 - Robert J. Dolan, Alvin J. Silk
- Perkin-Elmer: Data Systems Group 605
 - Robert J. Dolan
- Scandinavian Airlines Systems SAS (A) 618
 - Sandra Van der Merwe
- Titanium Industries, Inc.: Titanium Fabrications Division (A) 640
 - Benson P. Shapiro, Craig E. Cline
- Chesebrough-Pond's Inc.: Vaseline Petroleum Jelly 650
 - John A. Quelch, Penny Pittman Merliss

Marketing Organization and Implementation

- Marketing Organization and Implementation 671
 - John A. Quelch
- General Foods Corporation: The Product Management System 679
 - John A. Quelch, Paul W. Farris

Regency Facsimile, Inc.	692
Melvyn A. J. Menezes, Jon D. Serbin	
IBM Innovations: Introduction of the PS/2	703
Fareena Sultan	
Black & Decker Corporation: Spacemaker Plus Coffee Maker (A)	719
N. Craig Smith	
Rossin, Greenberg, Seronick & Hill, Inc. (A)	728
N. Craig Smith, John A. Quelch	

CONCLUSION 731

Marketing Strategy—An Overview	733
E. Raymond Corey	
IDS Financial Services	752
Minette E. Drumwright, Thomas V. Bonoma	

Lifespan, Inc.: Abbott Northwestern Hospital	766
Melvyn A. J. Menezes	
Loctite Corporation: Industrial Products Group	780
John A. Quelch	

APPENDIXES 795

Legal Restrictions on Marketing Management	797
Patrick J. Kaufmann	
Glossary of Marketing Terms	811
Richard S. Tedlow	

INDEX 833

OVERVIEW

AN INTRODUCTION TO CASES

Management instruction involves the development of a set of philosophies, approaches, skills, knowledge, and techniques. Lectures and readings are the most efficient way to acquire knowledge and to become informed about techniques. Exercises or problem sets are an excellent way to begin to learn about the application and limitations of techniques. But the development of philosophies, approaches, and skills is best served by the case method, which can also help to provide knowledge and experience with techniques. The case method becomes a part of a broad gauge approach to management education and development. It is therefore generally used in well-orchestrated concert with other approaches.

Most students and executive program participants are quite familiar with lectures, readings, exercises, and problem sets, but the case method is often new to them. It is important to understand the basis for the case method and to have some idea of how to approach cases. That is the purpose of this brief note.

The case method is built around the concepts of *metaphors* and *simulation*. Each case is a description of a real business situation and serves as a *metaphor* for a particular set of problems. The situations which you face as a manager may differ from the metaphors we have chosen here, but taken together, the cases provide a useful and relevant set of metaphors for marketing situations. The cases were selected to include a wide variety of products and company types so that at least some of them would be relevant along those dimensions. The situations analyzed and skills developed in the cases are relevant to almost all marketing management situations. Thus they are relevant to students of marketing management.

The case method of management instruction is based upon the belief that management is a set of skills, rather than a collection of techniques or concepts. The best way to learn a skill is to practice in a *simulation*-type process. Thus, the swimmer swims and the pianist plays the piano. The swimming novice might drown if thrown into deep water after reading a set of books. And few of us would want to hear a concert pianist who had never before touched a piano, but who had attended many lectures on piano playing. Because it is impractical to have the student manager manage a company, the case provides a vehicle for simulation.

The total case process consists of four steps ordered as follows:

1. Individual analysis and preparation.
2. Optional informal small group discussion.
3. Classroom discussion.
4. End-of-class generalization about the learning.

Each of these steps asks the participant to perform related but different activities.

While there is no "one ideal way to approach a case," some generalities can be drawn. The student gains the most by immersing him- or herself in the case and actively playing the role of the protagonist. The protagonist is usually one manager, but is sometimes a group. By actively studying the case, the student begins to learn how to analyze a management situation and develop a plan of action. By participating in an involved manner in the case discussion, the student learns to commit him- or herself to a position easily and to express that position articulately. The core of management decision making consists of the processes of analysis, choice, and persuasion.

The fourth step, generalization, is also part of good management practice. The smart manager steps back from each situation he or she has experienced and asks, "What did I learn?" and "How does the situation and the lesson relate to my whole experience?" The astute student will want to do the same thing on his or her own, building on the help provided by the instructor. An important part of that process is to relate the cases to the assigned reading material. The reading material generally provides the structure and techniques, and the case a simulated experience in the application of the structure and techniques. The cases also help to develop a generalized approach to business situations as well as a set of philosophies.

The case method is demanding of both teachers and students. Participants who are involved in each case analysis and discussion, and who attempt to generalize their learning across cases gain the most from the process.

Each person should strive to develop the ability to ask "the right questions" about each case. The instructor may provide specific questions for each case. The following questions are among those which are generally relevant to all cases:

- Who is the protagonist?
- What are his or her objectives (implicit or explicit)?
- What decisions (implicit or explicit) must I make?
- What problems, opportunities and risks do I, as the protagonist, face?
- What evidence do I have to help make the decision? Is the evidence reliable and unbiased? Can I improve it?
- What alternative courses of action are available?
- What criteria should I use to judge the alternatives?
- Are there ethical issues involved?
- What action should I take?
- How should I convince others in the company as well as customers, competitors, and channel members that my approach is best?
- What contingency plan do I have to respond to adverse reactions?
- What did I learn from this case?
- How does it relate to past cases and my own "live" experiences?

AN INTRODUCTION TO MARKETING

Marketing is the function of the company, or nonprofit organization, with the responsibility for serving customers and for dealing with intermediaries and external support organizations such as distributors and advertising agencies. Many people who come to the study of marketing with little or no business experience picture it as the study of selling and advertising. While marketing certainly includes selling and advertising, it encompasses much more. Perhaps the best way to explain the scope and nature of marketing is to review a specific example of some of the decisions marketers make.

The Substance of Marketing

Assume for a moment that you have decided to enter the watch business. You must make a set of important marketing-related decisions which might include:

1. To which consumers should I sell my watches? How should I define the consumer I hope to serve? Should I think in terms of geography, perhaps the country or region of the country in which my consumer lives? Or maybe the consumer's income or sex or fashion orientation is more important.
2. What product or products should I offer? For example, should I offer digital or analog, ornate or simple, multifunction or single function?
3. How much should I charge for each watch? Should I offer discounts to people who pay cash or who buy in large volumes?
4. Should I sell direct to consumers or through stores, and if through stores, what type of stores? Watches are, after all, sold in drug stores, gift shops, department stores, jewelry stores, and a myriad of other outlets. Do I want to offer my product in several types of outlets or only in one type?

This note was prepared by Professors Benson P. Shapiro and John A. Quelch.
Copyright © 1984 by the President and Fellows of Harvard College.
Harvard Business School case 0-584-124.