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What is This?
Five Principles for Workable Client-Based Projects: Lessons from the Trenches

Tará Burnthorne Lopez and Renée Gravois Lee

Despite the wide-ranging benefits of using client-based projects (CBPs) in the classroom, such projects can be overwhelming for instructors, and many shy away from the considerable workload and time commitment often required by CBPs. This article is designed to help marketing educators overcome such apprehensions and provide them with concrete tools to simplify CBPs and make them easier to manage. The authors discuss five principles they have developed for creating and implementing workable client projects. Their principles come directly “from the trenches” of their own experiences in planning and managing client-based projects across multiple courses. They address, for example, ways to customize CBPs to fit within specific course and professor time constraints, tips to manage the client relationship and students’ expectations, and strategies to streamline the feedback process. They offer workbench-level insights and practices drawn from their own experiences that instructors can put into practice immediately.

**Keywords:** experiential learning; client projects; course design; marketing education; business education

Client-based projects (CBPs) are a powerful pedagogical tool. The opportunity for students to apply their marketing knowledge to the needs of an actual client provides a rich, hands-on learning experience. The benefits of CBPs are many, such as

- Facilitating active, experiential learning (Gremler et al. 2000; Razzouk, Seitz, and Rizkallah 2003)
- Fostering skills such as problem solving, critical thinking, communication and teamwork—relevant skills that students need in the workplace (Barr and McNeilly 2002; Kennedy, Lawton, and Walker 2001)
- Adding realism to the classroom (Razzouk, Seitz, and Rizkallah 2003)
- Heightening students’ motivation, through knowing that their recommendations may be used in an actual business context (Fox 2002; Goodell and Kraft 1991)

In our own experiences, client-based projects help course concepts come to life and greatly enhance students’ ownership of the learning process. CBPs are beneficial to students, professors, clients, universities, and communities (Easterling and Rudell 1997; Fox 2002; Haas and Wotruba 1990; Limrud and Hall 1999).

However, despite support among marketing educators for the value of client-based projects, many instructors avoid integrating them into their courses. Some reasons for this hesitancy include struggles or uncertainties finding good clients, challenges grading projects that require so much feedback, and concerns about the considerable time commitment (Razzouk, Seitz, and Rizkallah 2003). Essentially, some instructors avoid CBPs because they view them as just too big to manage and not worth the trouble (Goodell and Kraft 1991).

These concerns are understandable and real. Our article is designed to help marketing educators overcome such apprehensions and provide them with new ideas and inspiration about how to effectively put client projects into practice. We offer the following five principles for developing and implementing workable CBPs.

1. Select clients with care (not all clients are good ones).
2. Design projects of varying scope (semester-long projects are not the only option).

Tará Burnthorne Lopez, D.B.A., is an assistant professor of marketing in the Department of Management and Marketing, College of Business, at the University of Southern Mississippi, Box 5091, Hattiesburg, MS 39406; phone: (601) 266-4631; e-mail: lopez@cba.usm.edu. Please direct correspondence to this author. Renée Gravois Lee, Ph.D., is a professor in the Department of Marketing and Advertising, School of Business, at Quinnipiac University, 275 Mt. Carmel Ave., Hamden, CT 06518; phone: (203) 582-8285; e-mail: Renee.Gravois.Lee@quinnipiac.edu. The authors presented parts of this article during the 2004 American Marketing Association Summer Educators’ Conference, Boston, Massachusetts (Lopez and Lee 2004). We are very grateful to our colleagues who shared advice, teaching tools for client-based projects, and/or commented on earlier drafts of this article, especially Bryan Hayes, Lawrence Silver, Katie Tuttle, Leila A. Fecho, Tracy Suter, and Debbie McAllister.
3. Invest in advance planning (which will save you time and trouble).
4. Manage and set high expectations (for students as well as clients).
5. Provide periodic and productive feedback (which benefits everyone involved)

The key concept of our paper is workable. Our article shows that yes, client projects are doable, and we offer numerous concrete tactics for how to make them workable. For instance, we provide insights about how to customize CBPs to fit within specific course and professor time constraints, and we address topics such as streamlining the feedback process, providing students with user-friendly templates, and establishing high standards. We provide examples and tools from our own client-based projects that professors may wish to use and adapt within their own courses.

Existing research has addressed the benefits of CBPs (Haas and Wotruba 1990; Kennedy, Lawton, and Walker 2001; Kolenko et al. 1996), how to implement CBPs (de los Santos and Jensen 1985; Laughton and Ottewill 1998; Linrud and Hall 1999; Razzouk, Seitz, and Rizkallah 2003), case examples of CBPs (Gujarathi and McQuade 2002; Haas and Wotruba 1990; Kennedy, Lawton, and Walker 2001; Kolenko et al. 1996), and integrating a CBP across multiple courses (Elam and Spotts 2004). Our five principles build on these works by helping professors simplify CBPs to fit more comfortably into their schedules without being overwhelming, while still accomplishing course objectives and contributing to enhanced student learning.

The principles we have developed come directly “from the trenches” of our own experiences in planning and managing client-based projects. Between the two of us, we have facilitated CBPs in Marketing Principles, Marketing Research, Marketing Management/Strategy, Integrated Marketing Communications, and Advertising courses. We have also directed CBPs in noncredit settings such as extracurricular workshops and student organizations’ projects. Some of our clients have included a regional library system, Domino’s Pizza’s largest franchisee with more than 160 locations, a local outdoor outfitter, a local ice cream parlor, a new product start-up, a professional hockey team, a local Chamber of Commerce, a regional convention and visitor bureau, a regional substance abuse council, a nonprofit environmental organization, and a local Chamber of Business.

Not only have we conducted client projects in a variety of contexts, but we have also experienced the highs, lows, and in-betweens of facilitating the projects. We have experienced the overwhelming and all-consuming projects, the mediocre ones, and the knock-your-socks-off stellar ones. Throughout these experiences, we have learned a variety of tactics to simplify the workload, while maintaining and enhancing positive student and client outcomes.

In the remainder of the article, we discuss our five principles for workable CBPs. For each principle, we offer a range of simple strategies and practical tips to simplify CBPs and make them easier to manage. In the conclusion of the article, we reinforce the importance of making CBPs work for you as the instructor.

**PRINCIPLE 1: SELECT CLIENTS WITH CARE**

Two fundamental challenges in implementing workable CBPs are recruiting and selecting good clients (Razzouk, Seitz, and Rizkallah 2003). Finding the right client can significantly enhance learning outcomes and save the professor a great deal of frustration and time.

**Recruiting Clients**

Sometimes clients simply fall into the instructor’s lap. The client contacts the university, is recommended by another faculty or staff member, is an acquaintance, or meets the instructor at an industry event. Other times, the instructor must actively seek out clients. Finding clients need not be difficult—a variety of sources of potential clients exist. Former students, other faculty, university advisory boards, industry trade associations, Chambers of Commerce, the yellow pages, the newspaper, small business development centers, and on-campus service learning centers all represent opportunities to find good clients. We find that most companies are eager to work with the university and students.

Always have your radar on for potential clients. No one has the time or inclination to go to every university, trade association, or Chamber of Commerce event; however, going to one event each semester that attracts practitioners can be sufficient to provide you with clients continuously. One author attends the back-to-school luncheon for the College of Business advisory council each semester. The business professionals on the council are proud supporters of the university and are excited to have the opportunity to take on a more direct role in the students’ learning experiences. They are also happy to see that professors are bringing the business world into the classroom. The more contacts you make, the more potential clients you have to choose from; thus, you can be more selective and have a better chance of finding a client that fits your course needs.

**Selecting Clients**

Once you have identified potential clients, then you must determine whether or not they are appropriate for the course. Selecting the right client will help you greatly in designing a workable CBP. Some clients make for better class projects than others (Goodell and Kraft 1991; Papamarcos 2002; Swan and Hansen 1996). “Bad” clients may want to be overinvolved or underinvolved. They may have wildly exaggerated ideas of what the students can accomplish in one semester (Laughton and Ottewill 1998). They may take on the
project for the wrong reasons. For example, one of our clients did not actually plan to use the results (which we learned after the fact) and did not take the project seriously. He turned out to be merely humorous the students by asking them to work on the project. In actuality, he wanted to teach the students himself and had aspirations of teaching at the university as an adjunct instructor. He was using the project for his own ends and ended up being a high-maintenance client for the instructor.

Fox (2002) identified several types of clients that at best require some accommodation and at worst should be avoided. The talker likes to talk and easily sways the subject. The instructor may need to guide the students by suggesting they allocate additional time when meeting with the client and encouraging them to keep the client on the subject while not being rude. The overaccommodator does not provide solid directions to the class but is happy with whatever he or she gets. The instructor may have to work to get specific objectives from this client. The undecided argumentative client is one in which the client’s firm has internal disagreement over the outcomes desired. As a result, the students may get a different directive each time they meet with the client. This type of client is best avoided. The add-on client is constantly thinking of new ideas to add to the project, and thus the project’s scope continually expands. The instructor must intervene and explain to the client that while all of the ideas may be worthwhile, it is not possible to accomplish them all in a single semester.

“Good” clients, on the other hand, are a pleasure for both the professor and students to work with. CBPs are much more doable when the instructor takes the time to identify good clients. Good clients understand that they are working with students and that the quality of work is not controllable, yet still convey that they have high expectations of the students and are eager to receive the project deliverables. They are enthusiastic about the opportunity to work with students and treat students with respect. Good clients understand that their personal level of involvement and the level of transparency they offer with respect to their business practices will affect the quality of the project. Finally, good clients accept that the instructor has specific learning objectives and the project may need to be adapted somewhat to best suit the teaching and learning purposes.

We have found that nonprofits make particularly good clients. Charities, local theater groups, museums, and cause-related organizations or events such as Mothers Against Destructive Decisions, a local American Heart Association heart walk, an anti-teen-smoking rally, or a local environmental cause are only a few of the possibilities. Nonprofits expose students to alternative business philosophies and marketing methods (Arnett, German, and Hunt 2003), build skills such as working with no or very small budgets, and can get students involved in a project that touches them personally. Nonprofits help facilitate reciprocal learning between students and the organization, particularly since nonprofit workers may be marketing novices or lack marketing training (Klink and Athaide 2004). Moreover, in our classrooms, contrasts between nonprofit and for-profit firms have led to stimulating discussions among our students. For example, one nonprofit client told the class that the organization, a library, did not have any competition. This was an eye-opener for the students, who, after the client left, became eagerly involved in a discussion about competition and the dangers of being myopic. The professor’s job is easier and more enjoyable any time students become more interested in a project.

Sometimes the instructor is the person who makes the difference between a good and a bad client. Instructors who inadequately screen clients and/or set expectations too high

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**TABLE 1**

Questions to Consider in Evaluating Clients

- Will the client project allow students to apply one or more of the major lessons covered in this course?
- Does the client have a clearly identifiable problem that the class can address? Sometimes, the client has a clear idea of the problem; other times, the instructor may need to help the client define the problem in terms students can comprehend (Goodell and Kraft 1991).
- Is the time required by the project appropriate given the anticipated learning outcomes?
- Will the client be available to the instructor and students during the course of the project?
- Does the client seem interested and/or enthusiastic about the project? A client who may only be doing the instructor a favor may view the project as a chore.
- Is the client willing to share necessary information?
- Does the client have a positive outlook about working with students?
- What is the client’s reason for participating in this project? Does the client actually plan to use the results? Will the client take the project seriously?
- Does the client have realistic expectations? Does the client understand that he or she will be working with students who may have limited or no professional experience, technical skills, and resources? Does the client understand that these are students and it is possible (although unlikely based on the authors’ experience) that he or she may not get anything worthwhile as a result of the project?
- Does the client have open mind with respect to the outcome of the project? Avoid projects in which the client appears to have some investment in a predetermined outcome. In other words, is the client simply looking for his or her original idea to be reinforced by the students’ work? This can cause problems, particularly if the students’ work does not support the outcome desired by the client.
or low can cause a potentially good client to be a bad one. Meeting with clients (preferably in person) to assess fit and convey expectations is very important. See Table 1 for a list of questions to consider when evaluating clients.

**PRINCIPLE 2: DESIGN PROJECTS OF VARYING SCOPE**

One of the reasons some educators hesitate to implement client-based projects is because they can seem so large and overwhelming. Yet comprehensive, semester-long, capstone-type projects are not the only model for CBPs. It is possible to create CBPs that are small, medium, or large in scope. The needs of real businesses have wide-ranging scopes, thus it is important that students gain experience working on business problems of varying size and scale. In doing so, students are exposed to issues that real businesses face and have the opportunity to apply marketing theory to those issues. In this section, we discuss several small- and medium-scale project options that can still offer the benefits of working with a real client while taking up less course time than a semester-long project.

A significant benefit of varying the project size/scope is to give instructors the flexibility to tailor the project to fit the course content, learning objectives, and time available for the project. Here are several additional benefits of small and medium CBPs (Lee and Tuttle 2004):

- Tightly defined parameters are more easily managed by students, instructors, and clients.
- Smaller CBPs offer flexibility for both instructors and students and still allow for a variety of learning outcomes and deliverables.
- When multiple small projects are used, students can gain a variety of project experiences and portfolio-building opportunities, not just one “big” deliverable such as a marketing plan.
- Addressing real marketing challenges with short lead times is a business world reality and a challenge for which students must be prepared.
- Clients see tremendous value in the immediacy of the results.

Even when a client needs a large-scale project, we have found that the client is still very happy if the instructor is only able to select a small part of the project to use in the course.

Tables 2 and 3 list several examples of small and medium CBPs that could be integrated into marketing courses. The projects vary in size, type of client, course, learning objectives, and deliverables. In particular, the examples illustrate how smaller-scale projects can offer the instructor flexibility in terms of when, where, and/or how to incorporate smaller CBPs into a course. The tables are designed to offer readers a wide range of possible project options and to encourage readers to think beyond the “comprehensive-semester-long-project” model as the only option. Moreover, Table 3 demonstrates how projects of varying sizes can be linked to meet the needs of one client.

While classifying a project as small, medium, or large is subjective, the following general time frames have worked in our courses. Small projects can generally be completed in 1 to 2 weeks, and the instructor can incorporate multiple projects within one semester. Medium projects range from 3 to 6 weeks of work; we have found that two medium projects can fit comfortably within one semester. Large projects range from 7 weeks of work to the entire semester.

An additional consideration related to project scope is project complexity. Projects that are too simple will not challenge students and/or will not achieve the course learning objectives. On the other hand, projects that are too complicated can frustrate and demotivate students. For example, if a client’s business is overly complex, it may take the students too much time to grasp the business model (Haas and Wotrub 1990). One of us had an experience in which the dean requested that a regional medical clinic be taken on as a client for a Marketing Management class. The medical clinic was located approximately 4 hours away. The lead doctor at the clinic had developed a revolutionary (according to the clinic’s owner) surgical method for correcting back problems that required very little recovery time and only a tiny incision. The complexity of this project scope resulted in several problems:

- Because of the distance, only a few students actually visited the facility. The remaining students did not have a good understanding of the business.
- The owner of the clinic was heavily biased with respect to the services offered. Therefore, it was challenging for the students to weed through the information he provided to determine which information was reality and which information was an overzealous sales pitch.
- Primary market research was necessary for students to truly assess the situation, but it took them too long to learn the industry. By the time they realized they needed to do some primary market research, it was too close to the end of the semester.

A good balance is a project scope that challenges students to the point that learning outcomes are maximized.

**PRINCIPLE 3: INVEST IN ADVANCE PLANNING**

Advance planning is critical to successful and workable CBPs. The time you spend in the beginning of the project will save you much, much more time in the end. Keep in mind the old adage about how working smart is better than working hard. In this section, we offer a number of advance planning strategies geared to help instructors spend their time in ways that are most “profitable” and make CBPs easier to manage.
<table>
<thead>
<tr>
<th>Project</th>
<th>Learning Objectives</th>
<th>Assignment/Deliverables</th>
<th>What Makes This a Successfully Sized CBP?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Small CBP: Students as strategic marketing consultants—Promotion</td>
<td>To understand store seasonality and how it affects demand and sales. To develop tailored marketing strategies/tactics for the target audience. To demonstrate ability to think creatively while simultaneously working to achieve company objectives.</td>
<td>Recommended plan of action to sell excess inventory.</td>
<td>This project has a narrow focus (sell excess inventory) and could be completed in as little as 1 to 2 weeks. This is a brainstorming/thinking/planning project that can be accomplished with very little background work required by students.</td>
</tr>
<tr>
<td>Small CBP: Students as strategic marketing consultants—Event marketing</td>
<td>To identify needs and characteristics of the target audience. To identify barriers to event attendance. To practice brainstorming. To develop tailored marketing strategies/tactics for the target audience.</td>
<td>SWOT analysis. Recommended plan of action to increase event attendance.</td>
<td>This project has a narrow focus (increase event attendance) and could be completed in as little as 1 to 2 weeks. This is a brainstorming/thinking/planning project that can be accomplished with very little background work required by students.</td>
</tr>
<tr>
<td>Medium CBP: On-campus focus groups</td>
<td>To identify needs and characteristics of target audience. To gain experience planning and moderating a focus group. To learn to analyze qualitative data. To learn to draw and present key insights from data. To strengthen writing skills.</td>
<td>Prepare focus group question guide. Moderate focus groups. Analyze data and draw insights. Prepare report/recommendations.</td>
<td>By narrowing the focus to discount programs for college-age skiers, students should be able to quickly grasp the concepts and jump right into the project. Little advance preparation work is needed, and the scope is narrow. The time frame for this project could be as short as 3 to 4 weeks.</td>
</tr>
<tr>
<td>Medium CBP: Retail point of sale (POS) audit</td>
<td>To identify effective and ineffective POS practices. To understand the link between POS tactics and sales. To apply new knowledge by making recommendations.</td>
<td>Assignment: Project might include the following: Analyze competitors' POS practices. Conduct intercepts with customers. Develop recommendations for promotional offers and pricing incentives. Deliverables: Report and recommendations on how to better use the POS environment.</td>
<td>This project will be challenging to students but is still accomplishable within 3 to 6 weeks.</td>
</tr>
</tbody>
</table>
Medium CBP: Market analysis and feasibility study

Client needs: Client wants to enter a new market or open a new location and needs marketing guidance to assess the feasibility/preparedness of the marketplace.

To learn about several research resources/sources of information
To understand how various internal/organizational and external environmental factors affect the feasibility of client entering the market
To appreciate the challenges of entering a new market and/or selecting a location

Assignment: Project might include the following: Demand assessment Market size assessment Review of geographic and economic barriers Price point analysis Analysis of the competition Analysis of competitive ad spending

Deliverables: Report and presentation of options and feasibility

This project will be challenging to students but is still accomplishable within 5 to 7 weeks.

Large or small CBP: Customer satisfaction and client retention program This example illustrates project components that can work together (as a large or medium project) or separately (as a small project).

Client needs: Client sees a decline in customer loyalty. Client needs to take a more in-depth look at satisfaction levels and determine next steps to preserve and grow its market share.

To understand the value of existing customers (vs. new customers) to the firm
To understand the challenges of measuring customer satisfaction and buying habits/motivation
To reinforce the importance of targeted programs and properly identifying appropriate buyers to target

Assignment: Elements of the program might include the following: Conduct intercept surveys at the point of sale to understand buying habits/motivation Enhance database by categorizing and coding customers and leads

Deliverables: Develop a warranty-based program to better target recent buyers Create retention-based direct mail campaign to renew customer support

This project is comprehensive and can be used to demonstrate and apply marketing theory throughout the semester.
### TABLE 3
Varying the Size and Scope of Client-Based Projects (CBPs) for the Same Client

**Client:** Creator of a New BBQ Sauce

**Client Needs:** The client has developed a new product, a BBQ sauce, and seeks help entering the regional market.

<table>
<thead>
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</tr>
</thead>
<tbody>
<tr>
<td>Small CBP (1): Design a label for the new product</td>
<td>To reinforce packaging and labeling concepts</td>
<td>Design label options, Present options and rationale to client</td>
<td>This project can be accomplished in 1 to 2 weeks. The project could easily be applied to creating a brand name and/or package size and shape for the product as well. This project could work in many marketing courses.</td>
</tr>
<tr>
<td>Small CBP (2): Taste test</td>
<td>To learn about the multiple factors customers use to evaluate products</td>
<td>Each team conducts taste tests comparing client's products with the competition, Each team writes report of results. Emphasize to students to think beyond the immediate results and consider questions such as &quot;What does this mean for the client?&quot; and &quot;How specifically can the client use these results?&quot;</td>
<td>This project would work particularly well in Consumer Behavior and Marketing Principles courses. The project could be accomplished in as few as two class periods. Conduct the taste test and discussion in one class and schedule the presentations of students' results in the second.</td>
</tr>
<tr>
<td>Small CBP (3): Positioning exercise</td>
<td>To understand the concept and importance of positioning</td>
<td>Identify all BBQ sauce competitors in the region, Create report/chart outlining the competition's positioning strategies, Brainstorm and determine positioning options to present to client</td>
<td>This project would take approximately 2 weeks to complete. The market is sufficiently narrow (regional BBQ sauce) to make it an easy project for students to jump right into.</td>
</tr>
<tr>
<td>Medium CBP (1): Design a label for the new product based on environmental analysis</td>
<td>To develop an understanding of the marketing environment and apply that to a marketing task</td>
<td>Analyze competitor packaging, Analyze regional customer base, Design label, Present analysis, results, and label to client</td>
<td>This project can be accomplished in approximately 4 weeks. The project could easily be applied to creating a brand name and/or package size/shape for the product as well. This project could work in many marketing courses.</td>
</tr>
<tr>
<td>Medium CBP (2): Design and evaluate a label for a new product</td>
<td>To gain experience in the creative process including evaluation of creative ideas</td>
<td>Design label, Conduct focus groups to evaluate appeal of new label, Revise label based on results of focus groups and reevaluate if necessary, Present focus group results and label to client</td>
<td>This project can be accomplished in 4 to 5 weeks. It could easily be applied to creating a brand name for the product as well. This project could work in many marketing courses.</td>
</tr>
<tr>
<td>Medium CBP (3): Select distribution channels based on product positioning</td>
<td>Same as Small CBP 3, plus the following: To learn about various distribution systems, their costs, and how to evaluate them. To evaluate distribution choices within the organizational and environmental context. To reinforce the importance of distribution.</td>
<td>Same as Small CBP 3, plus the following: Research various regional distribution methods client might employ. Consider both logistics and channels including Web-based, mail order, and traditional distribution; direct and indirect channels. Evaluate based on efficiency of cost and reaching the appropriate target audience. Write report/recommendations. Keep in mind the client’s manufacturing capacity.</td>
<td>This project will be challenging to students but is still accomplishable within 5 to 6 weeks.</td>
</tr>
</tbody>
</table>

| Large CBP (1): Integrated marketing communications plan (IMC) | To give students experience creating a comprehensive IMC campaign. | Determine target market. Determine message and media strategies. Determine most effective IMC tools. Create IMC executions. Create IMC implementation schedule. Prepare written report and oral presentation. Present to client. | This project is comprehensive and can be used to demonstrate and apply theory throughout the semester. |

| Large CBP (2): Strategic marketing plan | To give students experience thinking strategically and comprehensively about company marketing efforts. | Conduct an environmental analysis. Determine target market. Determine marketing strategy. Determine marketing program. Create an implementation schedule. Identify appropriate marketing control mechanisms. Prepare written report and oral presentation. Present to client. | This project is comprehensive and can be used to demonstrate and apply theory throughout the semester. |
Objectives and Deadlines

Establish specific objectives for the project. The first planning step is to outline specifically what you want students to accomplish with the project. CBPs can easily take on a life of their own, particularly if the client is strong-willed. Without specific objectives, the instructor may not even realize if the project has gone off into an unexpected direction. Concrete objectives are essential to make sure the instructor and client have the same vision for the project deliverables. Objectives are also very important for establishing grading guidelines and helping students understand desired outcomes. Some examples of specific learning objectives can be found in Tables 2 and 3.

Thoughtful advance planning will also help ensure that the project and its component activities will indeed lead to meaningful learning. The reality-based learning method developed by Smith and Van Doren (2004) offers a set of four standards/criteria to help professors judge the worthiness of various learning activities, and once chosen, to plan, implement, and evaluate each activity. These standards are that (1) “the purpose of each activity is student learning,” (2) “the student is co-responsible for learning in each activity,” (3) “the activity draws on knowledge and skills beyond the classroom and discipline,” and (4) the activity “ensures transferability of learning from the activity to outside the classroom” (Smith and Van Doren 2004, p. 67).

Divide the project into parts and set deadlines. Students are often overwhelmed if the project feels like “one big project,” and they have trouble getting started when the project seems large and looming. Breaking the project into manageable parts has several benefits: making the project more manageable for both the students and instructor, guarding against students falling behind, keeping procrastinator students from waiting until the end of the course to do the entire assignment, and sometimes they learn more from identifying their own weaknesses and areas needing improvement than when the instructor pinpoints them. Obtaining multiple evaluations can also make grading easier. For instance, you might use self, peer, and client evaluations as a starting point for preparing grading forms to our students so they can see the tools we use to grade their projects. The students can also use these forms as a method of self-evaluation. Posting the forms online helps ensure students can easily refer to them.

Evaluation Criteria

Prepare grading rubrics and standardized grading forms to make grading easier. Prepare your evaluation criteria in advance. We both give written evaluation criteria and/or grading forms to our students so they can see the tools we use to grade their projects. The students can also use these forms as a method of self-evaluation. Posting the forms online helps ensure students can easily refer to them.

Because of the subjectivity involved in most CBPs, we make a conscientious effort to be consistent in our grading. We have found grading forms to be very helpful in maintaining such consistency. By making these forms available to students, the students also feel more in control of their grades. Sample grading forms are provided in Appendixes A and B.

Plan a system for others to evaluate student work. Consider using self, peer, and client evaluations as a component of students’ grades. In particular, requiring students to reflect on and evaluate their own work is a vital part of the learning process (Keys and Wolf 1988; Kolb, Rubin, and McIntyre 1971). Students can often be more critical than instructors, and sometimes they learn more from identifying their own weaknesses and areas needing improvement than when the instructor pinpoints them. Obtaining multiple evaluations can also make grading easier. For instance, you might use self, peer, and client evaluations as a starting point for preparing
Managing student and client expectations is important to have a smooth, workable project. Appropriate expectations set the stage for satisfied clients, well-prepared students, and less stressed instructors. Some basic strategies for managing student expectations are to establish high standards, to reinforce the benefits of doing a real project for a real client, and to provide a number of project preparation tools. For managing client expectations, it is important to discuss and define the client’s role in advance and to shape the client’s expectations about what the students and the project can and cannot do. These points are discussed in greater detail below.

Managing Student Expectations

Establish high standards. Establishing and reinforcing high standards is one way to help manage student expectations. Professors can set the stage for high standards by repeatedly reinforcing that students can accomplish much more than they realize if they put forth the effort. Students are sometimes intimidated by CBPs, and this show of faith from the instructor can help give them confidence and keep them motivated.

Written and oral explanations of grading criteria are more concrete ways to communicate high standards. For instance, one of the authors uses the following grading system:

- **A** is reserved for work that is definitely superior in quality.
- **B** is earned by turning in work that is consistently good and that manifests sufficient interest, effort, or originality to lift it above average work.
- **C** is earned by work that is average and that has met the basic requirements of the assignment.
- **D** is earned by work that is below the standard.
- **F** is earned by work that is significantly below standard.

Such a grading schematic helps to counter the misperceptions many students have that by simply doing an assignment and meeting all the criteria they have earned an A and/or that they start out with an A and then “lose” points only for errors.

Another way to reinforce expectations is to show students exemplary examples of previous projects. As mentioned in Principle 2, when appropriate, samples and templates can go a long way toward reducing the ambiguity felt by students and reinforcing the quality and type of deliverables the instructor expects.

Reinforce benefits of client projects. Reinforcing the importance of the project to students’ professional development is another key practice for setting expectations and helping keep students’ motivation high. This emphasis helps them recognize that the project is not merely a course requirement but an opportunity to build skills, to build their portfolio, to make industry connections, and to benefit a real client. Students are much more motivated by working for a real client and knowing that the client may use their work than if the project is perceived as only an academic exercise. We have found that when we position the work as a consulting project, students deliver better results. Moreover, for some of our students, their work on client projects has led to networking, internship, and/or employment opportunities.

It is also helpful to explain to students that at the end of the project, they will have gained not only enhanced skills but a tangible product such as a marketing plan, a research report, or an advertising campaign that they can show potential employers/recruiters. Recruiters and employers who graduated from programs that relied on traditional classroom lectures often do not think to ask students about experiential projects they may have done in the classroom. Many recruiters believe that skills such as leadership, teamwork, time management, and managing real-life business issues are attained outside the classroom only (Barr and McNeilly 2002). By encouraging students to show recruiters examples of their work with real-world clients and use the examples during interviews as a springboard to discuss the skills they gained, we can help students overcome this misconception. Emphasizing client projects during interviews is particularly important for those students who do not take part in extracurricular activities.

Provide project preparation tools. To help students hit the ground running on CBPs and deal with some of their issues with ambiguity, we have found it helpful to offer a variety of “project preparation” tools. The sky is the limit in terms of the resources instructors might provide. We have developed tools such as

- a detailed list of library and research resources;
- a team action plan and tips for working in teams;
- guidelines for preparing effective reports and presentations; and
- tools for interacting with clients, such as strategies for asking good questions and guidelines for preparing effective meeting summaries and progress reports.

Each semester, we refine and add to our set of project preparation tools. Moreover, our discussions with other professors directing CBPs have yielded a number of useful strategies and resources that can help facilitate students’ work. A list of
tools we use in our courses is provided in Appendix C. Please contact either of the authors if you would like information about, or copies of, any of these tools.

**Managing Client Expectations**

Uncovering, understanding, and managing client expectations are challenging tasks even for seasoned marketing professionals (Fecho 2004). Advance meetings with the client are critical to ensure that he or she has appropriate expectations and to facilitate workable, successful CBPs. We meet with the client at least once prior to the beginning of each project. Topics to address include project objectives, deliverables, and timing; the client’s level and/or method of involvement; disclosure of client information; and expectations and quality of student work.

*Project objectives, deliverables, and timing.* Before the project begins, be sure you and the client are clear on the objectives and deliverables. Instructors should also explain the project timing in advance. If the client wants a 3-week turnaround and your plan is for students to work throughout the semester, then this client is probably not a good fit.

*Level of client involvement.* The instructor and client should discuss and agree on the client’s role in responding to student questions and how often the students will communicate with the client. Similarly, clients need to commit to attending a class meeting(s), observing and critiquing student presentations, and/or whatever level of involvement the instructor deems necessary. Clients must also understand that their involvement should not include actually doing any parts of the project for the students.

*Disclosure of information.* The extent of information the client will disclose to students is another area that needs to be agreed upon. Most companies have information they are uncomfortable releasing to the public; however, the quality of the project will be closely related to the level of disclosure. Get as much information as possible in the beginning of the project. Imagine the adverse consequences if the client offered to share budget information and did not follow through. Avoid working with clients who are overly secretive.

*Quality of student work.* Share with clients the range of work quality they are likely to see. This discussion can be as simple as explaining that students work at all ability levels and that students produce A, B, C, D, and F work. Moreover, we emphasize to clients that while they will gain many useful ideas from the students’ work, the primary purpose of the project is for the students to learn and apply marketing concepts.

Establishing appropriate expectations for students and clients makes CBPs much more manageable. Some professors create a written contract or “memo of understanding” that outlines responsibilities and expectations of the students and client (Haas and Wotruba 1990; Hayes and Silver 2004; Klink and Athaide 2004). Setting clear expectations ensures that you can spend your time challenging and mentoring students, rather than dealing with frustrated students or confused clients.

**PRINCIPLE 5: PROVIDE PERIODIC AND PRODUCTIVE FEEDBACK**

Feedback from the professor is very valuable to students, particularly for CBPs, since students often do not have benchmarks on which to evaluate this sort of original work. One research study suggests that the opportunity to reflect on one’s work is more important than the level of complexity to which students are exposed (Keys and Wolfe 1988). Feedback from the instructor provides students with that opportunity. Moreover, the instructor’s comments and input serve to challenge students to move beyond simplistic thinking and approach the client’s problem from a professional, sophisticated viewpoint.

However, instructors often dread the time that preparing feedback takes, particularly when they endeavor to offer thorough, detailed feedback. We believe strongly in the importance of feedback, but we are only human in our desire to avoid spending hours on end grading papers. Below we share a number of strategies we have implemented to streamline the feedback process and make it more manageable, while still providing quality feedback to students.

**Project Drafts**

One practice we recommend is to encourage or require students to submit parts of the project as drafts and allow them to revise/improve their work on each section before submitting the final paper. As with any experiential exercise, students need the opportunity to learn from their successes and mistakes to take lessons from them to apply to real business problems (Kolb, Rubin, and McIntyre 1971). Drafts can be required or recommended, and graded or nongraded. We have used all variations of these options. Whatever option you may select, set deadlines for the drafts. Even in those semesters that we have recommended (but not required) drafts, students have recognized the value of obtaining instructor feedback, most of our student teams have turned in the recommended drafts, and some teams have even submitted additional ones.

Responding to drafts may seem like a lot of work, but periodic drafts can actually reduce grading time required at the end of the project. We use a system in which we thoroughly review and offer written comments on each draft. We return the original draft with comments to the students and keep a photocopy for ourselves. When students submit the final document, we save time by referencing our comments on previ-
ous drafts and comparing them to the final version. Because we have already reviewed earlier drafts, we can evaluate the papers much more quickly while paying particular attention to see if our earlier comments were adequately addressed. It is only in the extreme case in which the final document is significantly new that the instructor would need to read the final document in painstaking detail.

Two significant benefits of drafts are for students to strengthen their work and for the instructor to shift some end-of-semester grading responsibilities and time to earlier in the semester when time is less scarce. An added benefit is that students are rarely surprised by their performance on the project. Feedback reduces the number of students who drop by your office surprised at their poor performance. Subjective grading can be trying on an instructor; periodic feedback ensures that students are aware of their progress.

Team Feedback Meetings

Providing verbal feedback can sometimes be more productive and save more time than written feedback. We give verbal feedback to the entire class and each individual group. Comments that are appropriate for the entire class are announced at a class meeting to prevent having to write the same comment repeatedly on students’ papers. In addition, each of us meets individually with each team at least once per semester. Sometimes these meetings are scheduled during class time; other times, they are scheduled outside of class or during office hours.

One-on-one meetings may seem time-consuming; however, we find that some of the greatest learning opportunities take place in our individual conferences with each team. Meeting with students in person can save time by allowing you to provide detailed explanations without having to explain everything in writing. However, the learning benefits are even greater than the time-saving benefits. We have witnessed, repeatedly, the light bulb going off in students’ heads during our one-on-one meetings. During these meetings, the detailed discussions about the students’ work generate a synergy that results in students’ asking more and better questions and putting more critical thought into the issues at hand. The opportunity to bounce ideas back and forth also leads students to further develop and strengthen their ideas. This kind of in-person synergy creates dynamic learning opportunities that do not arise when written feedback is used alone.

There is no question that students leave meetings with a much clearer understanding of the instructor’s expectations and evaluation of their performance. In the long run, this means fewer e-mails requiring long explanations, fewer students stopping by the office in confusion or frustration, and higher quality projects. However, we find the benefits of the meetings far exceed these practical matters. In our experience, one-on-one conferences are one of the most rewarding experiences of doing CBPs and not only help guide our students but are also highly motivating and rewarding for us as educators.

To make the meetings as productive as possible, we recommend holding them after the students have submitted and received feedback on at least one draft. The students need to be far enough into the project that they have enough knowledge and progress to engage in an earnest discussion of their work. Furthermore, instructors should impress upon students the importance of being prepared for the meeting. Require them to bring concrete evidence of preparation such as a list of questions, a progress report, previous drafts with feedback, and/or other materials that may be necessary, including a pen and paper for taking notes.

The importance of giving feedback at multiple points during the semester was reinforced during one of the authors’ first efforts at incorporating CBPs into a Marketing Research course. While some class time was allocated for team meetings with the professor, she also encouraged the students to meet with her outside of class and/or to submit drafts of their work for her to review but did not establish specific deadlines for doing so. As a result, none of the student teams met with her individually or submitted drafts. All teams appeared to be on track until the final project was submitted. Many of the reports were plagued with simplistic, amateurish thinking that ignored relevant issues and offered inaccurate data analysis. Unfortunately, the students turned in the final project to the client and instructor at the same time. The students did not have the opportunity to learn from correcting their mistakes, and the client received reports with inaccurate findings. That was a lesson learned for the instructor.

Other Tips to Simplify Grading and Feedback

The grading forms we mentioned earlier are very helpful to simplify grading drafts and final projects. Another tip is to create a file that includes your most common comments about students’ project work. Our experience suggests that even though clients may change from semester to semester, the mistakes students make tend to stay the same. By creating a file of your most common comments, you can cut and paste a customized comment sheet for each team, saving the time of having to handwrite all comments or prepare them from scratch. Furthermore, you are more likely to go into greater detail in your “common comments file” than you would if you had to handwrite every comment on every paper. With the comment file, you can create detailed feedback once in the “master” file and then cut and paste comments into a separate page/file for each individual team.

A final recommendation about providing feedback is to reinforce the strengths of the students’ work as well as areas needing improvement. CBPs are often a new method of learning for students, and they can become easily disheartened if
they do not get a pat on the back periodically. Try to incorporate positive feedback as well as constructive criticism into your “common comments file,” too.

**CONCLUSIONS**

**Make Client-Based Projects Work for You**

A key closing thought is that planning and implementing workable CBPs means making them work for you as the professor. Structure projects in a way that fits your teaching style, time available for the project, and other courses and responsibilities. And select projects that fit your interests! For instance, CBPs can offer opportunities to dovetail with your research interests and/or learn about a product, service, or industry you may wish to explore in more depth. CBPs should be enjoyable learning opportunities for students and instructors, and to conclude, we offer some ideas for how professors can derive their own benefits from the projects.

Students love to hear war stories—those vivid examples of companies and their mistakes and successes. Many instructors draw on their own professional experiences, but in time, those examples can become dated or even boring to the instructor. Finding the time to learn about new industries is always a challenge given our many responsibilities in and outside the classroom. CBPs give both instructors and students an excellent opportunity to learn about new industries and best practices. In turn, instructors can expand knowledge and examples from which to draw on for class discussions.

Some CBPs can provide opportunities to work on your research agenda (Elam and Spotts 2004). For the authors, CBPs have provided the impetus for writing a case study, doing a literature review, collecting data for use in academic articles, and writing this article. In addition, the increased knowledge about new industries and interaction with business practitioners often leads to new research ideas. In this manner, the effort you spend mentoring your students working on CBPs is also going toward your research.

From an external viewpoint, client-based projects address the Association to Advance Collegiate Schools of Business’s (AACSB) call for linking classroom theory with real-world business practices (Porter and McKibbin 1988). In this way, CBPs can contribute to making department chairs and deans happy. Moreover, CBPs provide good public relations opportunities—for you, your students, your department and School of Business, your university, and your client.

A final recommendation for making client-based projects work for you is to learn from other educators. Seeking out others who do CBPs and reading marketing education articles can provide you with a wealth of useful advice and resources. We have both benefited greatly from our connections with other professors who are willing to offer suggestions and provide project samples, templates, grading forms, and other tools that make our jobs managing CBPs much easier. It is always possible, too, that such connections might lead to research opportunities and partnerships.

**Toward Increased Use of Client-Based Projects**

A central aim of our article is to give professors a variety of strategies to simplify client-based projects and make them easier to manage, while still enhancing student and client outcomes. To accomplish this, we have offered five key principles for workable client projects, based on our combined years of experience facilitating CBPs across a variety of marketing courses. These principles are the following:

1. Select clients with care.
2. Design projects of varying scope.
3. Invest in advance planning.
4. Manage and set high expectations.
5. Provide periodic and productive feedback.

Within each principle, we have provided a range of concrete suggestions and tools that we hope will be helpful to instructors. We invite you to use and adapt these tools for your own courses. Please contact either of the authors if you would like more information about any of these resources (see Appendix C).

We hope that our article helps to counter the perception that CBPs are overly difficult to implement and not worth the time or effort. And, ultimately, we hope that our article sparks ideas about ways to incorporate and/or improve CBPs in marketing courses, decreases barriers to entry facing faculty members who wish to engage in them, and contributes to increased use of such projects by marketing educators. You can make CBPs work for you.
## APPENDIX A

### Marketing Plan Evaluation Form

| Group Members: ______________________________________________________________ |
| Criterion | Well Below Average | Below Average | Average | Above Average | Well Above Average | Excellent |
| Expectation for success—Am I convinced this marketing plan might really work? Will it achieve its goals? | | | | | | |
| Supportability—How well are the statements and assumptions substantiated by outside research and facts? Are the assumptions reasonable? Are sources cited? | | | | | | |
| Consistency—Is there consistency among all parts of the plan including the situation analysis, target market selection, and marketing program? Is the logic valid? | | | | | | |
| Completeness—Does it appear that information was collected and considered regarding all relevant factors? Have comments from earlier drafts been taken into consideration? | | | | | | |
| Critical thinking and creativity—Does the report reflect originality and sophistication in thinking rather than simplistic, superficial thinking? | | | | | | |
| Professionalism—Are the grammar, spelling, paragraph construction, and sentence structure sound? Is the paper typed with headings that make reading easy? Does the report look and read like a professional piece? | | | | | | |

### Additional comments:

Grading scale reminder:
A is reserved for work that is definitely superior in quality.
B is reserved for work that is consistently good and that manifests sufficient interest, effort, or originality to lift it above average work.
C is earned for average work and shows that basic requirements in class assignments have been met.
D earns credit but is below the standard.
F indicates failure and carries no credit.
### APPENDIX B

**Presentation Evaluation Form**

Team:

<table>
<thead>
<tr>
<th></th>
<th>Well Below Average</th>
<th>Below Average</th>
<th>Average</th>
<th>Above Average</th>
<th>Well Above Average</th>
<th>Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Content</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Presented appropriate and necessary information</td>
<td>0-10</td>
<td>11</td>
<td>12</td>
<td>13</td>
<td>14</td>
<td>15</td>
</tr>
<tr>
<td>Offered support and logical justification for statements</td>
<td>11</td>
<td>12</td>
<td>13</td>
<td>14</td>
<td>15</td>
<td>16</td>
</tr>
<tr>
<td>Integrated class material</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Moved beyond simplistic, superficial treatment of situation</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td><strong>Responses to questions</strong></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Responded effectively and professionally</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>5</td>
<td>6</td>
<td>6.5</td>
</tr>
<tr>
<td><strong>Style</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Creative approach to presentation; presentation was interesting</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>5</td>
<td>6</td>
<td>6.5</td>
</tr>
<tr>
<td>Presenters spoke clearly and held audience’s attention</td>
<td>3</td>
<td>4</td>
<td></td>
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</tr>
<tr>
<td>Behaved professionally and showed interest and enthusiasm</td>
<td></td>
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<tr>
<td>Made presentation with conviction and confidence</td>
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<tr>
<td>Appropriate interaction with client and class</td>
<td></td>
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<tr>
<td><strong>Organization</strong></td>
<td></td>
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</tr>
<tr>
<td>Used time wisely/did not waste time on unnecessary parts</td>
<td>-5</td>
<td>-2</td>
<td>0</td>
<td>2</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Effective organization/flow of the presentation</td>
<td>(write in deduction or points)</td>
<td></td>
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<tr>
<td>Ability of audience to follow transitions, etc.</td>
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</tr>
<tr>
<td><strong>Preparation</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Familiarity with marketing plan</td>
<td>-5</td>
<td>-2</td>
<td>0</td>
<td>2</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Effective visual aids</td>
<td>(write in deduction or points)</td>
<td></td>
<td></td>
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<td></td>
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</tr>
</tbody>
</table>

Total: ______ /50

Comments:
APPENDIX C
Summary List of Tools for Workable Client-Based Projects

**Project Instructions**
- Advertising plan instructions—example of detailed instructions
- Integrated marketing communications plan overview—example of short instructions

**Templates**
- Marketing plan template

**Grading Rubrics and Standardized Grading Forms**
- General grading standards
- Detailed grading standards
- Marketing plan grading form—written report
- Marketing plan grading form—presentation
- Project preparation tools
- Presentation hints handout—tips to help students prepare for presentations
- Research resources master list—fairly extensive list with descriptions of information found in each resource
- Research resources handout—same as above without the descriptions
- Asking good questions—tips to help students get relevant information from clients
- Project start/input forms—forms to help students organize the information they have and need
- Analyzing competitors’ positioning—list of competitor characteristics to evaluate
- Team action plan—form to help teams organize their meeting times and individual responsibilities

**Feedback Tools**
- Feedback file for marketing plan—list of strengths/weaknesses/issues/concerns that are common among student marketing plans. Comments can be cut and pasted into a fresh document to provide quick and easy feedback to students.
- Presentation feedback from audience—form allowing audience members (client representatives and nonpresenting students) to give feedback to presenters
- Client feedback form—questions designed to get feedback from clients about the students’ work and the project experience

**NOTE:** All items on this list are either Microsoft Word or Excel files. Please contact either of the authors if you would like copies of any of these resources.

**REFERENCES**


