Faculty Development Plan | **NAME**

Self-Assessment

Strengths, Skills, and Competencies

I am passionate about informing choice, in helping individuals and institutions make better decisions. This has been a common guide along an otherwise winding path to where I am at the crossroads of marketing and data science. It is a strength in that it helps motivate my efforts in and provides substance for both scholarship and teaching.

- In terms of scholarship, I have a core set of skills that include Bayesian statistics, choice modeling, writing and copyediting, and data analysis in R.
- In terms of teaching, I am a competent instructor with a special empathy for students who may not have raw technical talent or interest.

Interests, Opportunities, and Areas to Develop

I have been the recipient of such grace and mercy in what is an ongoing development as a scholar and a teacher. I am interested in continuing to develop while providing to others the help that has been given me. This is encapsulated by the following.

- Develop as a scholar beyond my core competencies by studying and conducting research with models and algorithms for unstructured data, including text.
- Revise the marketing research and analytics undergraduate sequence to better engage, inspire, and equip students for personal and professional success.
- Contribute as a citizen in the department and the discipline by collaborating on research and interacting with colleagues, both at BYU and elsewhere.

Goals

Scholarship

1. Complete work on four choice modeling papers.
    - Revise and resubmit the mixed membership modeling paper by the end of summer.
    - Produce an initial draft of the product relevance paper by the end of summer.
2. Study modeling and machine learning techniques for unstructured data.
    - Deliberate daily practice with relevant textbooks and technical notes.
    - Read and discuss published work with co-authors.

3. Initiate a research program that employs unstructured data.
    - Make use of the MEG Grant to hire RA's, get access to secondary data, etc.
    - Produce and present an initial draft of the first paper by autumn.

Teaching

1. Update the marketing research course to make survey design and analysis accessible.
    - Partner with Qualtrics to get access to data analysis and conjoint modules.
    - Produce improved material in time for use in marketing research in the fall.
2. Execute an improved form of the marketing research course.
    - Collaborate to ensure marketing research fits in a seamless junior core.
    - Genuinely incorporate elements that are spiritually strengthening.
3. Continue to improve the marketing analytics course.
    - Learn from modifications to the marketing research course.
    - Revise materials to better cover data acquisition and communication.

Citizenship

1. Learn how to effectively collaborate by working with Jeff Dotson.
    - Meet with Jeff at a scheduled time every week to discuss progress.
    - Ask for and work to implement mentoring advice.
2. Foster collegial relationships in the department.
    - Go to lunch at least once a week with someone from the department.
    - Initiate research discussions and actively seek advice from senior colleagues.
3. Develop a presence in the discipline.
    - Attend and actively interact with colleagues at conferences.
    - Nurture connections with existing and potential collaborators.

Alignment with Institutional Aspirations and Needs

My passion for informing choice is ultimately manifested in the preaching of the gospel and being able "to assist individuals in their quest for perfection and eternal life." In other words, I am fully invested in doing my part in the ongoing mission of BYU. Specifically, my professional goals add to our department and school's emphasis on analytics research and education. It is my intent and hope to do so in a way that is both spiritually strengthening and intellectually enlarging.

Activities and Accomplishments

Scholarship

- Resubmitted the second paper from my dissertation to *Marketing Science*.
- Contributed to a review paper accepted at *Customer Needs and Solutions*.
- Was awarded a MEG Grant in Winter 2017.

Teaching

- Developed the Marketing Analytics course, which debuted in Fall 2016.
- Guest lectured on marketing analytics in Mike Swenson's Marketing Principles class in Fall 2016.
- Guest lectured in Tamara Master's PhD preparation seminar in Winter 2017.
- Taught an introduction to R tutorial for a mixed MBA and undergraduate Analytics Boot Camp in Winter 2017.
- Created and used a guide to help advise nearly a dozen marketing students considering a statistics minor.

Citizenship

- Helped establish relationships with SSI (Kelsey White, Brent Fuller), Lifetime Products (Bob Goodwin), The Modellers (Kristy Allen), and Intermountain Wood Products (Danil Zakirov) for recruiting students.
- Presented on Marketing Research and Analytics for the Marketing Major Information Session in Winter 2017.
- Advised the Business Career Center in the development and tracking of effectiveness metrics in Winter 2017.
- Recommended Candace Willmore for the Nestle Waters internship in Winter 2017.
- Helped place Karley Mackay at 3M (Clarissa George) for a marketing analytics internship in Winter 2017.
- Helped place Cameron Halversen at Lifetime Products (Bob Goodwin) for a marketing research internship in Winter 2017.
- Helped place Ben Manning at The Modellers (Kristy Allen) for a marketing research internship in Winter 2017.
- Presented on Marketing Research for the Applying to the Marketing Program Webinar in Summer 2017.

Course Development Project | **Name**

Overview

Revise the marketing research and analytics undergraduate sequence to better engage, inspire, and equip students for personal and professional success.

Teaching Goals

1. Update the marketing research course to make survey design and analysis accessible.
   - Partner with Qualtrics to get access to data analysis and conjoint modules.
   - Produce improved material in time for use in marketing research in the fall.
2. Execute an improved form of the marketing research course.
   - Collaborate to ensure marketing research fits in a seamless junior core.
   - Genuinely incorporate elements that are spiritually strengthening.
3. Continue to improve the marketing analytics course.
   - Learn from modifications to the marketing research course.
   - Revise materials to better cover data acquisition and communication.

BUS M 442 Marketing Research
Fall 2017

Instructor:	Name
Course Schedule:	MW, 12:30–1:45 pm (W122 TNRB)
Office Hours:	MW, 2–4 pm, or by appointment (671 TNRB)
TAs:	Names (marketing.research.ta@gmail.com)
TA Office Hours:	TTh, 9:30–11 am (133 TNRB)

1 Overview

This course provides a practical introduction to marketing research, with an emphasis on survey research and data analysis, and how it can be used to help businesses make more effective marketing decisions. The material includes applications of many of the techniques covered in the introductory statistics course. It will involve lectures, walkthroughs, discussions, exercises, labs, quizzes, exams, and a semester-long group project.

1.1 Course Purpose

Students will demonstrate their ability to execute a marketing research project, including problem definition, research design, data collection, data analysis, and reporting.

1.2 Learning Outcomes

Having successfully completed this course, students will be able to do the following.

- Identify appropriate questions for survey research.
- Design and implement surveys.
- Visualize data.
- Apply intuition for statistical inference in analyzing primary data.
- Design and run a conjoint study, including using a market simulator.
- Perform basic text analysis.
- Interpret findings from data analysis and make marketing recommendations.

2 Materials

This course is focused on learning to perform survey research and analyze data. Students will gain proficiency in the use of Qualtrics to design and implementing surveys and StatWing

to analyze data. Each student will need to bring a laptop, either their own or one rented from BYU, to follow along with walkthroughs, complete exercises and assignments, and do project work.

All lecture notes and other course materials will be available on Learning Suite (learning-suite.byu.edu).

3 Studying

For many students, this course's technical content may be difficult. While the course is structured to build students' intuition for data analysis slowly, the amount of time needed to master the material may vary. Students should consider the following study tips.

1. Seek learning by study and faith (D&C 109:7).
2. Prepare for class by studying the assigned materials.
3. Actively participate and take notes during class.
4. Study with classmates and ask questions.
5. Learn by being an integral part of the group project.
6. Use the quizzes to gauge how well the concepts are understood.

4 Assessment

Letter grades will follow the standard rubric. As mandated, the course will be graded on a curve that results in a B+ average (i.e., 3.4 GPA).

A	93-100%	B-	80-82%	D+	67-69%
A-	90-92%	C+	77-79%	D	63-66%
B+	87-89%	C	73-76%	D-	60-62%
B	83-86%	C-	70-72%	E	0-59%

Grades will be determined as follows.

1. Class Participation 10%
2. Quizzes (5 at 4% each) 20%
3. Exam 20%
4. Labs 10%
5. Group Project 40%
   - Research Objectives (5%)
   - Exploratory Research Report (5%)
   - Survey (10%)
   - Final Report (10%)
   - Presentation (10%)

4.1 Class Participation

Regular attendance and participation is expected. Students should be at least as concerned with the quality of their contributions to class discussions as they are with the quantity. Multiple absences or inappropriate behavior during class (such as being rude or disruptive) may result in a lower grade for the class participation component.

4.2 Quizzes

While students are encouraged to study in groups, each of the five quizzes is to be completed individually, without assistance from other classmates. Each quiz will be available on Learning Suite and is intended to be used as a gauge of how well students understand the material that is being covered. The quizzes also provide practice for the in-class exam.

4.3 Exam

The exam will be held at the end of the Data Analysis unit (see the course schedule). It will be cumulative, closed book, and closed notes.

4.4 Labs

Labs will be completed in pairs. They are designed to provide the practice needed for students to successfully conduct their own data analysis for the group project. Each student will need to bring a laptop, either their own or one rented from BYU, on lab days.

4.5 Group Project

The group project gives students the opportunity to have a hands-on experience with the course material. They will identify research objectives, run and summarize the findings from a focus group, and then create and code a questionnaire in Qualtrics. The questionnaire will be initially graded then revised. Once the coded questionnaire has been approved, it will be distributed electronically to a "friends and family" sample. After the data has been

gathered, the group will analyze it using the techniques covered in class. Based on the data analysis, the group will write a final report and present their findings and recommendations to the class.

4.5.1 Qualtrics

The group project includes coding the questionnaire in Qualtrics. The software is available to all Marriott School students. To create an account, visit www.qualtrics.com and click on "Click here to register and start taking advantage of Qualtrics."

4.5.2 StatWing

We will analyze data using Qualtrics' StatWing, a Web-based data analysis tool.

4.5.3 Presentations

Each group will be required to present their project in class. The other members of the class will help evaluate these presentations. These peer evaluations will be a key input in determining each group's grade for the presentation.

4.5.4 Peer Evaluation

At the end of the semester, group members will rate one another in terms of their relative contributions. Peer evaluations will be treated confidentially and will not be disclosed to students. I reserve the right to lower the final grade of any student who does not make a full contribution to group work.

5 Schedule

All assignments are due on Learning Suite at the start of the class session they are associated with in the schedule (see the next page). Relevant readings are listed for each week, including a number of articles that also need to be read by the start of the class session they are associated with.

Please note that I reserve the right to change the syllabus, including the schedule, at any time and for any reason. In such circumstances, I will provide sufficient notice as it relates to quiz, exam, lab, and project deadlines.

Week	Unit	Topic	Assignment
Week 1 September 6	Getting Started	Introduction to Marketing Research	Class Survey (W)
Week 2 September 11, 13		Research Process Qualtrics	Form Groups (M) Research Objectives (W)
Week 3 September 18, 20		StatWing **Lab**: Exploratory Analysis	Exploratory Survey (W)
Week 4 September 25, 27	Survey Design	Asking Questions Measurement Scales	Quiz 1 (M) Exploratory Report (W)
Week 5 October 2, 4		Attributes and Levels Survey Flow	Conjoint Design (W)
Week 6 October 9, 11		Sampling **Marketing Research in Practice**	Draft Survey (W)
Week 7 October 16, 18	Data Analysis	Data Visualization **Lab:** Data Visualization	Quiz 2 (M)
Week 8 October 23, 25		Foundations of Inference **Marketing Association Trips**	Final Survey (M)
Week 8 October 30, November 1		Statistical Inference Hypothesis Tests	Applying Inference (W)
Week 10 November 6, 8		**Lab**: Analyze Survey Data Reporting Results	Data Analysis Plan (W)
Week 11 November 13, 15	Modeling	Consumer Response **Lab:** Key Drivers Analysis	Quiz 3 (M)
Week 12 November 20		Conjoint Analysis	
Week 13 November 27, 29		**Lab**: Market Simulation Text Analysis	
Week 14 December 4, 6	Group Projects	**Group Project Day** Group Presentations	Quiz 4 (M)
Week 15 December 11, 13		Group Presentations Review	Final Report (W) Peer Evaluations (W)

6 Honor Code

In keeping with the principles of the BYU Honor Code, students are expected to be honest in all of their academic work. Academic honesty means, most fundamentally, that any work a student presents as their own must in fact be their own work and not that of another. Violations of this principle may result in a failing grade in the course and additional disciplinary action by the university. Students are also expected to adhere to the Dress and Grooming Standards. Adherence demonstrates a student's respect for themselves and others and ensures an effective learning and working environment. It is the university's expectation, and every instructor's expectation in class, that each student will abide by all Honor Code standards. Please call the Honor Code Office at 422-2847 with any questions about those standards.

7 Sexual Misconduct

As required by Title IX of the Education Amendments of 1972, the university prohibits sex discrimination against any participant in its education programs or activities. Title IX also prohibits sexual harassment – including sexual violence – committed by or against students, university employees, and visitors to campus. As outlined in university policy, sexual harassment, dating violence, domestic violence, sexual assault, and stalking are considered forms of "Sexual Misconduct" prohibited by the university.

University policy requires any university employee in a teaching, managerial, or supervisory role to report incidents of sexual misconduct that come to their attention through various forms including face-to-face conversation, a written class assignment or paper, class discussion, email, text, or social media post. If anyone encounters sexual misconduct, please contact the Title IX Coordinator at t9coordinator@byu.edu or 801-422-2130 or Ethics Point at titleix.byu.edu/report or 1-888-238-1062 (24-hours). Additional information about Title IX and available resources can be found at titleix.byu.edu.

8 Student Disability

Brigham Young University is committed to providing a working and learning atmosphere that reasonably accommodates qualified persons with disabilities. If a student has any disability which may impair their ability to complete this course successfully, please contact the University Accessibility Center (UAC), 2170 WSC or 422-2767. Reasonable academic accommodations are reviewed for all students who have qualified, documented disabilities. The UAC can also assess students for learning, attention, and emotional concerns. Services are coordinated with the student and instructor by the UAC. If a student needs assistance or if they feel they have been unlawfully discriminated against on the basis of disability, they may seek resolution through established grievance policy and procedures by contacting the Equal Employment Office at 422-5895, D-285 ASB.

Course Development Project Grant Proposal | **NAME**

I am applying for a Course Development Project Grant in order to fund a year-long subscription to DataCamp: www.datacamp.com.

DataCamp is a premier online data science and analytics teaching platform that specializes in R and Python instruction. The platform is heavily integrated with my teaching. Students in my Marketing Analytics class complete assignments on DataCamp. The platform now provides students access during the semester for free.

However, outside of the Winter semester when Marketing Analytics is taught, I don't have access and am thus not able to stay on top of new developments on the platform, keep my own skillset up-to-date, and be able to decide on and prepare for the best resources on the platform in preparation for the Marketing Analytics class in the Winter.

Scholarship Strategies Project | **NAME**

Overview

The organizing framework for this scholarship strategies project is to develop as a scholar beyond my core competencies by studying and conducting research with models and algorithms for unstructured data, including text.

Scholarship Goals

1. Study modeling and machine learning techniques for unstructured data.
   - Deliberate daily practice with relevant textbooks and technical notes.
   - Read and discuss published work with co-authors.
2. Initiate a research program that employs unstructured data.
   - Make use of the MEG Grant to hire RA's, get access to secondary data, etc.
   - Produce and present an initial draft of the first paper by autumn.

Productivity Strategies

- Keep a regular work schedule, from at least 7 am to 5 pm: Study and deliberate practice until 9 am; research until 2 pm; teaching prep until 5 pm.
- Study, write, code, and end with next steps for research every day.
- Avoid distraction by looking at news feeds only at lunch and propping open my door.
- Meet with Jeff at a scheduled time every week to discuss progress.
- Don't needlessly wait to discuss issues with research until the scheduled meeting.
- Divide responsibilities across co-authors.
- Set deadlines to complete specific pieces of the project.
- Effectively use RA's.

Evaluation Method

Having the first working paper ready to submit by February 2018 at the latest.

Citizenship Project | **NAME**

Overview

Contribute as a citizen in the department and the discipline by collaborating on research and interacting with colleagues, both at BYU and elsewhere.

Citizenship Goals

1. Learn how to effectively collaborate by working with *name*.
   - Meet with *name* at a scheduled time every week to discuss progress.
   - Ask for and work to implement mentoring advice.
2. Foster collegial relationships in the department.
   - Go to lunch at least once a week with someone from the department.
   - Initiate research discussions and actively seek advice from senior colleagues.
3. Develop a presence in the discipline.
   - Attend and actively interact with colleagues at conferences.
   - Nurture connections with existing and potential collaborators.