

# EVALUATING THE IMPACT OF STUDENT RESPONSE SYSTEMS ON STUDENT PERFORMANCE

*John P. Camey, University of Central Oklahoma  
Gordon T. Gray, University of Central Oklahoma  
Stacia Wert-Gray, University of Central Oklahoma*

## ABSTRACT

*This study explores the impact of student response systems (SRS) on student performance. The primary goal of these systems is to improve student academic achievement through the use of computerized technology in the classroom. Previous studies have provided some support for the positive impact of an SRS on learning outcomes (particularly exam scores and course grades). This research effort, comparing standardized test performance of students using an SRS with the performance of students in a more traditional learning environment, further extends the emerging stream of SRS-performance research. The study results suggest that use of an SRS in the classroom improves learning outcomes.*

## INTRODUCTION

The value of computerized technology in higher education has been recognized for decades (Little 1973; Peled 2000). Kryder (1999), for example, suggests use of computers at home and at school has created a more “visually literate” and collaborative generation of students. More generally, Rankin and Hoas (2001) posit that students prefer computer facilitated education because it enhances learning outcomes by engaging more of the senses. Guthrie and Carlin (2004), focusing on interactive computer technologies, suggest that these technologies provide a good fit with the interactive learning preferred by “the rising generation of hyper-capable technology users” (p. 1).

One classroom technology emerging and gaining in popularity over the past decade is the student response system (SRS), or “clicker.” An SRS is a wireless response system allowing instructors to request information from students using interactive PowerPoint slides. Students respond through a hand-held response pad (clicker), sending information to a receiver (connected to a classroom computer). The instructor is then able to immediately share gathered information with students.

Murphy and Riddle (2003) describe a number of technologies that can be classified as a SRS. Labels for these systems (incorporating handheld devices, a receiver, and software) include classroom response systems, personal response systems, communication systems, and audience response systems (Roschelle et al. 2004; Caldwell 2007). All systems feature a handheld clicker unit with a unique signal, allowing responses from each individual student to be recorded. Classroom use varies greatly, but often involves the instructor ask-

ing questions and then presenting summaries of responses from the entire class (after all students have been given an opportunity to respond).

Although a SRS involves multiple technologies, the systems are generally considered easy to prepare and use in the classroom (Guthrie and Carlin 2004; Caldwell 2007). Many commercial systems are available and some publishers now include SRS software and support with textbook adoption. Once the software is installed, classroom use requires the instructor to create and display PowerPoint slides. A student’s task is simply to enter responses to questions by pressing clicker buttons. Student preparation for using a SRS is also quite simple. Response pads are generally inexpensive and can usually be purchased through the campus bookstore. Each student may also be required to pay a small fee to register the response pad (online) with the manufacturer. The registration process associates each student’s identifying information with a specific response pad and a particular course.

Caldwell (2007) reports that clickers have been used in a large number of classroom settings (nursing, chemistry, philosophy, business, economics, psychology, and many others), for a diversity of purposes (including “spicing up” lectures, assessing students’ opinions and understanding, and increasing instructor-student interaction), and in a variety of course formats (tutorials, lectures, peer instruction, etc.). Murphy and Riddle (2003), however, suggest that clickers are most effective in large classes as a stimulus to greater student involvement and interaction. Whatever the setting, purpose, and format, both students and instructors have generally responded positively to the systems (Elliot 2003; Beekes 2006).

As noted by Caldwell (2007, p. 13), clicker usage is

primarily motivated by the desire to improve learning outcomes. In recent years, many educators have asserted that clicker technology has tremendous potential in this regard (e.g., Johnson and McLeod 2004; Knight and Wood 2005). Long before the development of SRS technology, some educators presented evidence suggesting that feedback to students (the type now provided by clickers) is a stimulant to learning (Guthrie 1971; Kulhavy 1977; Kulik and Kulik 1988). Others noted the positive impact of repeated questioning on student performance (Frase et al. 1970; Boyd 1973). More recently, research has shown that clicker systems, through both questioning and provision of immediate feedback, are likely to increase the level of student engagement and participation during class sessions (Poulis et al. 1998; van Dijk et al. 2001). Summarizing outcomes observed in mathematics courses at West Virginia University, Caldwell (2007) suggests that this increased level of engagement positively impacts performance for many students.

Research to date offers considerable support for the suggestion that use of clickers results in improved exam scores and course grades (Duncan 2005; Knight and Wood 2005; Preszler et al. 2007). In addition to the benefits provided by increased student engagement and participation during class, potential explanations for the positive impact of clickers on learning outcomes include positive student attitudes toward clickers, frequent use of classroom discussions, and peer learning approaches along with clickers, and increased attendance (Poulis et al. 1998; Jackson and Trees 2003; Caldwell 2007). Much of the prior research examining the impact of clicker usage on learning outcomes, however, has been limited by the absence of standardized tests allowing an assessment of student understanding (or learning) given various instructional approaches (Hake 2002).

## HYPOTHESES

This study seeks to add to the existing stream of research examining clicker usage and learning outcomes. Rather than seeking to replicate the results of prior studies finding positive changes in exam scores and course grades following introduction of clickers to a particular course (e.g., Preszler et al. 2007), the current study compares student learning outcomes in two class formats (same course). One class format utilizes a SRS and one does not utilize clicker technology. Student learning is assessed through performance on a standardized exam. The research effort tested two hypotheses.

H1: For each class format, student performance on an end-of-course assessment exam will exceed performance on a beginning-of-course assessment exam.

Draper (1998) argues that many applications of classroom technology (such as SRS) do not offer significant improvements over previously established delivery

methods. He further suggests that successful technology applications, rather than replacing existing approaches, address specific weaknesses of those approaches. In the case of clickers, adoption is generally seen as a means of over-coming the audience passivity and limited interaction that often develop in a traditional lecture-oriented classroom (Draper, Cargill, and Cutts 2002). Caldwell (2007) notes, however, that there are a number of ways to increase student participation, even in large classes, without adopting SRS technology (show of hands, response cards, etc.). Recognizing that positive learning outcomes are produced by a variety of delivery systems, this hypothesis suggests that the course itself, regardless of clicker usage, results in student learning.

H2: Student performance on an end-of-course assessment exam will be higher for the class format utilizing a SRS than for the class format not utilizing a SRS.

Instructive questioning is certainly not a new approach to teaching. Nor is it, more specifically, a dramatically new means of addressing audience passivity. Implementing an instructive questioning approach through a SRS, however, does offer some advantages over “low-technology” (more traditional) methods (Caldwell 2007; Draper, Cargill, and Cutts 2002). Lack of privacy with a show of hands or verbal responses, for example, may limit participation and bias student responses. A SRS not only allows private responses, but tallies responses and allows the instructor to quickly provide feedback to the class. Permanent response records are also helpful in giving instructors the capability to subsequently assess student understanding of specific material. A case can therefore be made that the SRS, though not the only means of stimulating a passive classroom, is a better means of addressing this issue than those often found in university classrooms. As Draper (1998) notes, positive classroom technology applications are characterized by a good fit between specific learning problems and the technology. Hypothesis 2 suggests that a SRS offers this type of fit, and thus has a positive impact on student learning outcomes.

## METHODOLOGY

The hypotheses were tested by comparing student performance outcomes on a departmental assessment exam. Testing was completed in fundamentals of marketing class sections at a southwestern university. Each student completed the assessment exam at the beginning of the semester and at the conclusion of the semester. As shown in the Appendix, the exam contains 20 items covering basic marketing topics (market segmentation and targeting, product positioning, marketing program elements, etc.). Students select from four response options (the correct response for each item is underlined in the Appendix). Students are generally able to complete

the exam in approximately 15 to 20 minutes. At the time of this research effort, the assessment exam had been in use for several years, and was specifically designed in an effort to assess learning outcomes, program effectiveness, and instructional effectiveness.

Exam results were considered from class sections in which clickers were used and from class sections in which no SRS was utilized. Class sections met two days per week in the afternoon and were taught by the same instructor. The class time was one hour and fifteen minutes per class. Textbook, PowerPoint slides, and assignments (exams, projects, etc.) were identical for all sections. There was also little variation in classroom procedures among the sections. A lecture-discussion format, guided by PowerPoint slides, was the basic model. Video material and in-class exercises were used on a regular basis. Questions intended to stimulate discussion, assess student understanding, and clarify key points were addressed to students in all sections.

In both clicker and non-clicker sections, responses to questions were predominantly verbal. In the clicker sections, however, students used clickers in responding to a limited number of questions (generally four or five) during each regular class period. Some examples of these questions follow:

- ◆ What is the BCG term for a business unit that has a relatively high market share in a relatively slow growing market?
- ◆ Purchase of a soft drink would generally represent which type of consumer problem solving?
- ◆ What do we call those forces that the organization's marketing department cannot control?

For each question, four response options were available to students. Identical questions were presented (either verbally or through PowerPoint slides) to students in the non-clicker sections. No questions presented in the classroom (including those utilizing the SRS) were included in the departmental assessment exam.

The instructor had utilized clickers in previous classes and reported little difficulty in again preparing classes for clicker use. A few students (less than ten) in the clicker sections had purchased and used clickers previously and were able to use their clickers in the fundamentals of marketing course. The remaining students purchased clickers at the campus bookstore for \$15. All students in the clicker sections were required to pay an additional \$15 to register a clicker online for semester use (one clicker can be used in all courses). No students reported difficulties in purchasing or registering clickers. Possibly due to many students lack of prior exposure to SRS technology, however, the instructor was required to address several minor problems with clicker use in the first two class meetings. After these initial difficulties, students did not present the instructor with either general or specific concerns related to classroom use of the SRS. At

the conclusion of the semester, many students in the clicker sections provided positive verbal feedback to the instructor regarding clicker usage.

Preliminary analyses suggested that the composition of the clicker and non-clicker sections was very similar. Chi-square analyses indicated no significant differences between the two groups in terms of sex, classification (junior or senior), major, or status as a domestic or international student. A two independent sample t-test found no significant difference in mean student age between the clicker and non-clicker sections.

## RESULTS

All performance comparisons were completed using independent samples t-tests. Student performance outcomes were first examined by comparing mean scores on the beginning-of-course assessment exam with mean scores on the end-of-course assessment exam. This analysis was completed (separately) for the class format (sections) in which clickers were used and for the class format (sections) in which clickers were not used. Levene's test indicated that equality of variances could be assumed for the two groups in each comparison. In both cases, mean exam scores were significantly higher on the end-of-course assessment exam. These results, displayed in Table 1, support H1.

The beginning-of-course assessment mean exam score for the clicker class sections was then compared with the beginning-of-course mean exam score for the non-clicker sections. Levene's test again indicated that equality of variances could be assumed for the two groups. The test result, shown in Table 2, indicated no significant difference in beginning-of-course scores between the two class format groups. This suggests that students in the clicker sections of the basic marketing course were similar to students in the non-clicker sections in terms of initial knowledge of the course material.

The final comparison was between end-of-course mean exam scores for the two groups. Levene's test indicated that equality of variances could not be assumed for the two groups ( $F = 2.82, p = .10$ ), and an adjusted t-test was therefore used in the analysis. This test revealed that the mean exam score was significantly higher for class sections in which a SRS was used. The test result, presented in Table 3, supports H2.

## DISCUSSION

The results of this research provide evidence that student learning occurs through both a traditional classroom format (lecture and discussion) and a classroom format utilizing SRS technology. The evidence also suggests that use of a SRS positively impacts student learning (or performance) when compared with the more traditional class format. These findings are consistent

**TABLE 1  
COMPARISON OF BEGINNING AND END OF COURSE EXAM SCORES**

	<b>N</b>	<b>Mean</b>	<b>SD</b>	<b>t</b>	<b>p-value</b>
Non-Clicker					
Beginning	61	7.82	2.68	6.72	<.001
Ending	60	11.68	3.58		
Clicker					
Beginning	53	6.98	4.13	9.93	<.001
Ending	58	13.67	2.92		

**TABLE 2  
COMPARISON OF BEGINNING OF COURSE EXAM SCORES**

	<b>N</b>	<b>Mean</b>	<b>SD</b>	<b>t</b>	<b>p-value</b>
Non-Clicker	61	7.82	2.68	1.30	.20
Clicker	53	6.98	4.13		

**TABLE 3  
COMPARISON OF END OF COURSE EXAM SCORES**

	<b>N</b>	<b>Mean</b>	<b>SD</b>	<b>t</b>	<b>p-value</b>
Non-Clicker	60	11.68	3.58	3.31	.001
Clicker	58	13.67	2.92		

with previous research findings pointing to improvements in exam scores and grades through clicker usage (Knight and Wood 2005; Caldwell 2007). The research also extends previous efforts, while addressing a limitation of prior studies, by considering student performance on standardized tests rather than evaluating learning outcomes using only in-class assessment instruments. In responding to the call for more systematic research examining the learning benefits of clickers (Hake 2002; Roschelle et al. 2004), this study helps to build a foundation for future research.

A limitation of the study is the inability to precisely identify what causes improved student performance when clickers are used in the classroom. As Roschelle et al. (2004) note, changes to teaching approaches and classroom procedures, rather than the use of a SRS, may be

responsible for positive learning outcomes. Caldwell (2007) further suggests that students may be treated differently when clickers are used and this special treatment (even if more perceived than actual) could be a key factor causing performance improvements. While these points are certainly valid, it must also be pointed out that improved teaching methods and “special treatment” given to students using clickers both come about as a result of clicker usage. In a sense, clickers may positively impact learning outcomes both directly and indirectly. A higher level of student engagement, stimulated by repeated questioning and immediate feedback, aids in retention and has a direct and positive impact on student performance. But in a more indirect manner, a SRS may improve learning outcomes by helping to create positive student affect, contributing to increased attendance, and

spurring classroom management changes. In all cases, the underlying stimulus for the improved performance outcomes is clicker usage.

This study examines learning outcomes among a limited number of students completing one course at one university. Any attempt to generalize the results to other learning environments is certainly open to debate. From this perspective, the study can be viewed as an exploratory effort. It is hoped that this research, as well as other efforts, will help in further developing a stream of research examining the learning (or performance) impact of clicker use in different environments. Results from a small number of prior studies have already led some to conclude that the positive learning impact of clickers is limited to particular courses (e.g., Slain et al. 2004). Other studies, however, report improved student perfor-

mance across a variety of courses (e.g., Preszler et al. 2007). Caldwell (2007), in her extensive review of clicker usage in higher education, suggests that combining peer learning with clickers seems to improve learning outcomes to a greater extent than simply integrating clickers into traditional lecture class formats. Preszler et al. (2007), exploring another aspect of SRS technology integration, find evidence of differences among upper-division and lower-division students both in their general impression of clickers as well as learning outcomes. These and other research efforts attest to the need for future research examining clicker usage in many courses and course formats. More specifically, course subject, the manner of clicker integration, and student status (in terms of program/degree completion) appear to be particularly promising areas for extended research efforts.

---

## REFERENCES

- Beekes, W. (2006), "The 'Millionaire' Method for Encouraging Participation," *Active Learning Higher Education*, 7 (1), 25–36.
- Boyd, W. (1973), "Repeating Questions in Prose Learning," *Journal of Educational Psychology*, 64, 31–38.
- Caldwell, J.E. (2007), "Clickers in the Large Classroom: Current Research and Best Practices Tips," *CBA-Life Sciences Education*, 6 (Spring), 9–20.
- Draper, S. (1998), "Niche-Based Success in CAL," *Computers and Education*, 30, 5–8.
- \_\_\_\_\_, J. Cargill, and Q. Cutts (2002), "Electronically Enhanced Classroom Interaction," *Australian Journal of Educational Technology*, 18 (1), 13–23.
- Duncan, D. (2005), *Clickers in the Classroom: How to Enhance Science Teaching Using Classroom Response Systems*. New York: Addison Wesley and Benjamin Cummings.
- Elliot, C. (2003), "Using a Personal Response System in Economics Teaching," *International Review of Economics Education*, 1 (1), 80–86.
- Frase, L., E. Patrick, and H. Schumer (1970), "Effect of Question Position and Frequency Upon Learning from Text Under Different Levels of Incentive," *Journal of Educational Psychology*, 61, 52–56.
- Guthrie, J. (1971), "Feedback and Sentence Learning," *Journal of Verbal Learning and Verbal Behavior*, 10, 23–28.
- Guthrie, R.W. and A. Carlin (2004), "Waking the Dead: Using Interactive Technology to Engage Passive Listeners in the Classroom," *Proceedings of the Tenth Americas Conference on Information Systems*, New York, (August), 1–8.
- Hake, R. (2002), "Lessons from the Physics Education Reform Effort," *Conservative Ecology*, 5 (2), 28.
- Jackson, M. and A. Trees (2003), *Clicker Implementation and Assessment*. Retrieved from [comm.colorado.edu/mjackson/clickerreport.htm].
- Johnson, D. and S. McLeod (2004), "Get Answers: Using Student Response Systems to See Students' Thinking," *Learn. Lead. Technology*, 32 (4), 15–23.
- Knight, J. and W.B. Wood (2005), "Teaching More by Lecturing Less," *Cellular Biology*, 4, 298–310.
- Kryder, L. (1999), "Integrating Computer Literacy: Why and What Can Be Done," *Business Communication Quarterly*, 62 (2), 81–86.
- Kulhavy, R. (1977), "Feedback in Written Instruction," *Review of Educational Research*, 53, 211–32.
- Kulik, J. and C. Kulik (1988), "Timing of Feedback and Verbal Learning," *Review of Educational Research*, 58, 79–97.
- Little, J. (1973), "The Role of Academic Computer Department in the Uses of Computer in the Undergraduate Curricula at the Two-Year College Level," *Paper presented at the Fourth Conference on Computers in the Undergraduate Curricula*. Claremore, CA.
- Murphy, P. and R. Riddle (2003), *Interactive Learning Tools and Techniques: Personal Response Systems*. Retrieved from Duke University Center for Instructional Technology: [http://cit.duke.edu/resource-guides/personal%20Response%20Systems.pdf], (2004, February 16).
- Peled, A. (2000), "Bringing the Internet and Multimedia Revolution to the Classroom," *Campus Wide Information Systems*, 17 (1), 16.
- Poulis, J., C. Massen, E. Robens, and M. Gilbert (1998), "Physics Lecturing with Audience Paced Feedback," *American Journal of Physics*, 66 (5), 439–41.
- Preszler, R.W., A. Dawe, C.B. Shuster, and M. Shuster (2007), "Assessment of the Effects of Student Re-

sponse Systems on Student Learning and Attitudes Over a Broad Range of Biology Courses,” *CBE-Life Sciences Education*, 6 (Spring), 29–41.

Rankin, E., and D.J. Hoass (2001), “Teaching Note: Does the Use of Computer Generated Slide Presentations in the Classroom Affect Student Performance and Interest?” *Eastern Economic Journal*, 27 (3), 355.

Roschelle, J., W. Penuel, and L. Abrahamson (2004), “The Networked Classroom,” *Educational Leadership*, 61 (5), 50–54.

Slain, D., M. Abate, B.M. Hodges, M.K. Stamatakis, and S. Wolak (2004), “An Interactive Response System to Promote Active Learning in the Doctor of Pharmacy Curriculum,” *American Journal of Pharmaceutical Education*, 68, 1–9.

van Dijk, L., G. van den Ber, and H. van Keulen (2001), “Interactive Lectures in Engineering Education,” *European Journal of English Education*, 26 (1), 15–18.

#### APPENDIX ASSESSMENT EXAM

1. Environmental scanning is the process of continually acquiring information on events occurring outside the organization in order to identify and interpret potential trends.
2. A group of potential consumers toward which an organization directs its marketing program is a target market.
3. A competitive advantage is a unique strength that an organization has relative to its competitors.
4. If Kellogg issues a coupon for \$1.00 off the next purchase of Corn Flakes and places that coupon inside a box of Corn Flakes, the company is implementing a market penetration strategy.
5. Market segmentation involves aggregating prospective buyers into groups that (1) have common needs and (2) will respond similarly to a marketing action.
6. Jakubowski Farms Gourmet Bread Base is the brand name for a mix designed for use in bread machines. The mixes, only available through the mail, are sold in 2-pound canisters for \$14.99 plus shipping. People learn about this product through word-of-mouth communication and through bread machine demonstrations the company’s founder offers to civic and community groups in Wisconsin. This is a description of the company’s marketing mix.
7. A skimming price strategy involves setting a high initial price for a product and assuming that a limited number of customers with a strong desire for the product will be willing to pay that price.
8. Steve Walker was happy with his newly purchased personal computer. It had all the features he wanted and he considered the \$1800 price to be reasonable. As he was taking the computer out of the box, Walker noticed an advertisement in the local paper showing a similar computer system for only \$1500. Suddenly, Walker began to doubt his purchase decision. He was afraid that he had not gotten such a good deal after all. Steve Walker was experiencing cognitive dissonance.
9. Consumers generally spend little time and effort evaluating alternatives in the purchase products such as soap and milk. The purchase process for such items, termed routine problem solving, is virtually a habit and is typical of low-involvement decision-making.
10. Manufacturers, retailers, and government agencies that buy goods and services for their own use or for resale are collectively referred to as the organizational market.
11. To lower costs and reduce manufacturing time, Michelin has people work together on important purchases. This type of cross-functional group, including individuals in various roles (buyers, decision makers, gatekeepers, etc.) is known as a buying center.
12. A concept describing the stages a product passes through in the marketplace – introduction, growth, maturity, and decline – is called the product life cycle.

**APPENDIX (CONTINUED)**  
**ASSESSMENT EXAM**

13. Harry & David is a catalog retailer. At its inception, the company sold fruit baskets and popularized the “Fruit of the Month” concept. The company later abandoned this restrictive definition of itself, expanded its product mix, and used promotion to explain that it is now the source of the “perfect gift” for every occasion. Harry & David used a repositioning strategy.
14. The individuals and firms involved in the process of making a good or service available for use or consumption are considered members of a marketing channel.
15. A dual distribution approach allows a firm to reach different groups of buyers by employing two or more types of channels for the same basic product.
16. The process of defining a marketing problem and/or opportunity, systematically collecting and analyzing information, and then recommending actions to improve an organization’s marketing activities is called marketing research.
17. Consumer oriented is an appropriate term for the marketing concept era.
18. In the 1960’s, Pillsbury defined its mission as, “We are in the business of satisfying needs and wants of customers.” This brief statement has come to be known as the marketing concept.
19. Several states have legislation requiring children under four to use car seats. This type of influence on marketing decision making is known as an external factor.
20. A market is comprised of people with the desire and the ability to buy a product.

# MARKETING EDUCATION FOR SUSTAINABILITY

*Wendy Bryce Wilhelm, Western Washington University*

## ABSTRACT

*This paper attempts to provide a clear justification for incorporating education for sustainability (EfS) into business education generally, and marketing curricula more specifically. A set of core sustainability concepts are suggested for inclusion in marketing coursework. A review of existing research demonstrates that business students' knowledge levels vis a vis these concepts is low. The paper concludes with speculation about why marketing educators tend to be "eco-illiterate," and offers suggestions for those who wish to adopt an EfS approach in their courses.*

## INTRODUCTION

Marketing Education for Sustainability requires that our curricula advocate a triple bottom line approach to personal and marketing decision-making that emphasizes the requirements for a sustainable lifestyle, company, economy, and society: (1) environmental/ecological stewardship (maintenance and renewal of "natural capital"), (2) social stewardship (equitable distribution of resources, human and community well-being), and (3) economic stewardship (valuing financial continuity along with profit) (Agenda 21 1993; Hawken et al. 1999; Senge et al. 2008).

Many trends are converging to provide a clear justification for incorporating education for sustainability (EfS) into business curricula. This paper examines these trends and suggests that the marketing discipline is well positioned to take the lead in this endeavor. Next, a set of core sustainability concepts are suggested for inclusion in marketing coursework, followed by a review of existing research demonstrating that business students' knowledge levels vis a vis these concepts is low. The last section of the paper speculates about why marketing educators tend to be "eco-illiterate" and offers suggestions for those who wish to adopt an EfS approach in their courses.

### WHY SHOULD BUSINESS SCHOOLS CARE ABOUT EFS?

The first trend of importance is the United Nations Environment Program (UNEP), which has called for a *Decade of Education for Sustainable Development* (2005–2014; UNESCO 2004). With this impetus, Deans from business schools across the globe have joined with the United Nations Global Compact, a network of over 375 business associations devoted to pursuing sustainable practices in their organizations, to develop *Principles for Responsible Business and Principles for Responsible Management Education* (UN Global Compact 2008a, 2008b). These agreements provide a framework for integrating EfS across all business curricula, including a set

of principles in the areas of human rights, labor, environment, and anti-corruption (see Table 1 and 2 for a list of the *Principles*).

Second, business students are demanding more sustainability-related content. Another signatory on the Global Compact agreement is Net Impact, a nonprofit organization of MBA students devoted to developing leaders who can use the power of business to make a net positive social, environmental, and economic impact (Net Impact 2008). This organization has grown to more than 10,000 members in 119 student chapters in more than 170 countries spanning six continents. Net Impact has also developed a new program for undergraduates in response to significant increases in demand; there are currently 24 chapters at U.S. and Canadian universities (Net Impact 2008). A recent survey of undergraduate business students by this organization found that 87 percent of them believe that business leaders should consider the social and environmental effects of their business decisions; 77 percent want to work for such firms after graduation. These students are actively seeking courses and programs that espouse a "triple bottom line" approach to business decision-making, and can teach them how to solve social and environmental problems; they "seek to influence business behavior by influencing business education" (Knowledge@Wharton 2003, p. 1). For this generation of business students, "sustainability . . . is not an afterthought. It is a central thought. They're coming to your campus soon" (Insidehighered.com 2008, p. 1). This increased student demand for sustainability related courses and programs has led *The Princeton Review* to release its first "green ratings" for U.S. universities in its 2009 editions of college guides (<http://www.princetonreview.com/green.aspx> 2009).

A third trend of import is the fact that marketers are increasingly adopting sustainable business practices, as the evidence mounts linking sustainability with market share and long-run profitability (Business Week 2007; Global Finance 2008; Mendoca and Oppenheim 2007). Key components of practitioners' sustainability efforts

**TABLE 1**  
**UN GLOBAL COMPACT PRINCIPLES FOR RESPONSIBLE BUSINESS**

The principles in Table 1 are based on those established by (1) The Rio Declaration and Agenda 21, outcomes from the 1992 UN Conference on Environment and Development (UNCED), (2) The Universal Declaration of Human Rights, and (3) The United Nations Convention Against Corruption. For the complete text of these documents and the *Principles*, see [<http://www.unglobalcompact.org/AboutTheGC/TheTenPrinciples/index.html>].

**Human Rights**

Principle 1: Businesses should support and respect the protection of internationally proclaimed human rights; and

Principle 2: Make sure that they are not complicit in human rights abuses.

For example:

- ◆ Provide a living wage and some measure of job security.
- ◆ Assist with the eradication of poverty in communities where they operate.
- ◆ Assist with equitable distribution of resources: food, affordable housing, health care, education, job training (social justice).
- ◆ Encourage sustainable consumption; do not engage in “greenwashing.”

**Labor**

Principle 3: Businesses should uphold the freedom of association and the effective recognition of the right to collective bargaining;

Principle 4: The elimination of all forms of forced and compulsory labour;

Principle 5: The effective abolition of child labor; and

Principle 6: Eliminate discrimination of employment and occupation.

For example:

- ◆ Avoid “sweatshop” and child labor practices.
- ◆ Avoid discrimination based on sex, age, race, etc.

**Environment**

Principle 7: Businesses should support a precautionary approach to environment challenges;

Principle 8: Undertake initiatives to promote greater environmental responsibility; and

Principle 9: Encourage the development and diffusion of environmentally friendly technologies.

For example:

- ◆ A precautionary approach means that when there are threats of environmental damage from business operations, measures should be taken to prevent environmental degradation, even when there is a lack of full scientific certainty about the nature of these threats;
- ◆ Re-define company strategies to include the “triple bottom line” of sustainability: economic continuity, environmental stewardship and restoration, social equity;
- ◆ Refocus design, manufacturing processes, etc. toward cleaner production, eco-efficiency, and “design for sustainability.”

**Transparency and Anti-Corruption**

Principle 10: Businesses should work against corruption in all its forms, including extortion and bribery.

include modifications to product development strategies (e.g., design-for-environment, dematerialization of products and packaging), production processes (e.g., resource eco-efficiency, adopting “clean tech” solutions), pricing strategies (full-cost accounting to include environmental costs), and distribution strategies (e.g., ensuring that suppliers meet specified labor standards, reverse logis-

tics to remanufacture products) (Barbut et al. 2005; Chouinard 2005; Esty and Winston 2006; Grant 2007; Senge et al. 2008; Slater 2007a). Sustainability’s link to profit, or as an end goal for business, is becoming a commonly discussed topic around the world in a wide range of industries and situations (e.g., Alexander 2007; Fischer 2007; Goodland 2007; Hastilow 2008; Jackson

**TABLE 2**  
**UN GLOBAL COMPACT PRINCIPLES FOR RESPONSIBLE MANAGEMENT**

**Education (PRME)** The Principles for Responsible Management Education (PRME), launched at the 2007 Global Compact Leaders Summit in Geneva, provide an engagement framework specifically for academic institutions to advance corporate social responsibility through the incorporation of universal values into curricula and research. The PRME have been developed by an international task force of sixty deans, university presidents and official representatives of leading business schools and follow from a recommendation of all academic stakeholders of the Global Compact. More details about the PRME Initiative can be found at [<http://www.unprme.org>].

As institutions of higher learning involved in the education of current and future managers we are voluntarily committed to engaging in a continuous process of improvement of the following Principles, reporting on progress to all our stakeholders and exchanging effective practices with other academic institutions:

**Principle 1. Purpose:** We will develop the capabilities of students to be future generators of sustainable value for business and society at large and to work for an inclusive and sustainable global economy.

**Principle 2. Values:** We will incorporate into our academic activities and curricula the values of global social responsibility as portrayed in international initiatives such as the United Nations Global Compact.

**Principle 3. Method:** We will create educational frameworks, materials, processes and environments that enable effective learning experiences for responsible leadership.

**Principle 4. Research:** We will engage in conceptual and empirical research that advances our understanding about the role, dynamics, and impact of corporations in the creation of sustainable social, environmental and economic value.

**Principle 5. Partnership:** We will interact with managers of business corporations to extend our knowledge of their challenges in meeting social and environmental responsibilities and to explore jointly effective approaches to meeting these challenges.

**Principle 6. Dialogue:** We will facilitate and support dialog and debate among educators, business, government, consumers, media, civil society organizations and other interested groups and stakeholders on critical issues related to global social responsibility and sustainability.

2008; Ryan 2008; Walker 2008). Further, over sixty Fortune 500 companies have recently formed a coalition, the U.S. Climate Action Partnership that is calling for a national limit on carbon dioxide emissions leading to reductions of 30 percent or more over the next 15 years (Slater 2007b).<sup>1</sup>

**MARKETING EDUCATION FOR  
SUSTAINABILITY (EfS)**

While business coursework is following practice in some disciplines, attention to sustainability issues in marketing curricula is limited, for the most part, to discussions of “green” customers, environmental considerations in product development and packaging, and social/non-profit marketing (Aspen Institute, Business and Society Program 2007; Beyond Grey Pinstripes 2008; Demoss and Nicholson 2005). Social and non-profit marketing courses tend to focus on issue-based

non-profit organizations that are attempting to change customer behavior in a pro-social direction (e.g., energy conservation, recycling campaigns). There are very few marketing courses at either the undergraduate or graduate level that devote a significant amount of time to how strategic and tactical decisions in marketing can contribute to the implementation of a more sustainable business model in both for- and non-profit organizations. Thus, there appears to be an increasing discrepancy between the importance placed on sustainable marketing by practitioners and its importance to marketing educators. This places our students at a competitive disadvantage in the marketplace, and also fails to give them the knowledge and skills they need to be sustainability advocates in their place of employment.

This is somewhat disconcerting, given that marketing educators have been calling for more attention to environmental and social issues in marketing education for more than a decade (Anderson 2007; Demoss and

Nicholson 2005; Galbraith and McNabb 1999; Mintu and Lozada 1993; Springett 2005). In fact, the case can be made that the marketing discipline is well positioned to be a leader in integrating sustainability concepts and practices into business coursework. Marketing is the only business discipline that studies the complete product life cycle from product concept to distribution, purchase, use and end-of-life stages. Seventy-five percent of the environmental and social impacts of a product during its lifetime are determined at the design stage, when materials (e.g., chemicals, recyclability) are selected (Ottman 2008). Marketing managers have direct control over impacts because they often decide on a specific product concept and design based on marketing research findings. Distribution strategies and supply chain considerations are also under the purview of the marketing discipline. "Greening" of the supply chain requires the selection of a product transport mode that reduces greenhouse gas emissions, shorter distribution channels (e.g., "buy local" campaigns), and an examination of upstream suppliers to ensure that their employees are making living wages as part of a fair trade policy. In sum, as Jacquelyn Ottman, a long-time consultant on green marketing strategies, so aptly puts: "... the real power of green lies in the hands of marketers – we, the creative folks who have the power to design and promote cleaner products and technologies and help consumers evolve to more sustainable lifestyles" (Ottman 2008, p. 1).

#### **CORE CONCEPTS TO INCLUDE IN MARKETING EDUCATION FOR SUSTAINABILITY (Efs)**

So what should we be teaching our students? A review of recent publications in both business and social sciences journal reveals a consensus around a set of core sustainability concepts. Table 3 displays these concepts and their definitions in alphabetical order, while Table 4 indicates how sustainable marketing differs from social marketing, green marketing, social entrepreneurship, and other sustainability-related concepts. While marketing departments may have neither the resources nor the expertise to offer a separate course in sustainable marketing, every marketing course can incorporate the key concepts outlined in Table 3. Discussion of specific sustainability concepts and tools that are most relevant for Principles of Marketing, Buyer Behavior, and other marketing courses can be found in papers by Bridges and Wilhelm (2008) and Shapiro (2008), and in Fuller's 1999 text, *Sustainable Marketing*.

Regardless of which curricular model is adopted, marketing educators need to embrace an interdisciplinary and international approach to teaching sustainability, because the successful development and implementation of sustainable marketing strategies require, at a minimum, a working knowledge of biology (biomimicry, or

learning from sustainable biological models), engineering and industrial design (design for environmental principles), operations and lean manufacturing (greening the supply chain, global outsourcing, and carbon footprints), environmental and international studies (global ecosystem impacts of marketing activities), and the management literature on environmental management systems (EMS), ethics, social justice and equitable resource distribution (e.g., Ferrell and Ferrell 2008; Hart 2005). One practical means of gaining this breadth of knowledge is to jointly develop a sustainability research stream and/or marketing course with faculty from the afore-mentioned disciplines (Everett 2008; Rowe 2007; Sammalisto and Lindqvist 2008).

#### **STUDENTS' KNOWLEDGE OF SUSTAINABILITY CONCEPTS**

How knowledgeable are marketing students about the key concepts displayed in Table 3? General awareness of sustainability issues is growing, along with demand for coverage of this topic in higher education curricula (Carlson 2008; Rowe 2007; Sherman 2008), but only one longitudinal study was found that directly assessed marketing students' awareness of sustainability related concepts. Anderson (2007) conducted a longitudinal study of marketing students' awareness and perceived importance of specific environmental and social issues. She found that over the course of the six-year study, 30–50 percent of students were unaware of problems with nuclear waste, asbestos, chemical pollution, and other environmentally caused diseases; awareness of an issue was positively related to media attention. Anderson used the findings to introduce these concepts (and others) into the *Principles of Marketing* course. Such education has been found to increase business students' sensitivity to environmental issues and their desire to find business careers within sustainable organizations, even at the cost of lower salaries (Cordano et al. 2003; Goldbach 2007; Leimsider 2006). These findings are consistent with a recent UNEP report noting that a lack of information is the main barrier to customers' adoption of a more sustainable lifestyle (Barbut et al. 2005, Figure 7). It appears that both students and the general public are beginning to recognize the importance of adopting sustainable behaviors and advocating for sustainable business practices. However, as Thomas (2005) states, "In order to integrate sustainability into managerial decision-making processes, students . . . must be persuaded of its *legitimacy* as a business issue" (p. 188). One of the best means of establishing legitimacy is through including sustainability in marketing courses and textbooks.

Student exposure to sustainability concepts and sustainable business practices is a function of course and textbook coverage of these issues; less coverage means less exposure to and thus less familiarity with the topic of

**TABLE 3**  
**KEY SUSTAINABILITY CONCEPTS**

**Biomimicry:** (1) Nature as model: a science that studies nature's models and then imitates or takes inspiration from these designs and processes to solve human problems, e.g., a solar cell inspired by a leaf; (2) nature as measure: using biomimicry as an ecological standard to judge the "rightness" of innovations; (3) a new way of viewing and valuing nature, based on what we can learn from the natural world rather than what we can extract from it (see Benyus, *Biomimicry* 1997).

**Clean Technology:** An approach for protecting the environment by preventing the pollution at source, minimizing waste and reducing energy use; application of "Silicon Valley" style innovation, technologies, and entrepreneurship to opportunities in energy, water, and advanced materials (see Pernick and Wilder, *The Clean Technology Revolution: The Next Big Growth and Investment Opportunity* 2007).

**Corporate Social Responsibility (CSR):** The need for an organization to consider the good of the wider communities, local and global, within which it exists; to be accountable to all of its stakeholders in all its operations (employees, investors, customers, public, etc.). CSR has been expanded in recent years to include the concept of sustainable business practices, putting more of an emphasis on environmental stewardship and social justice (i.e., Corporate Sustainability), (see Vogel 2005; Young and Tilley 2006).

**Cradle to Cradle Design/Manufacturing:** When the manufacturer is responsible for all aspects of the product from "life to death" – from RandD and raw materials sources through production, distribution, consumption, and disposal. Emphasis on designing products to be remanufactured or reused, e.g., books that are produced to be remade into books, take-back policies where the manufacturer "takes-back" the product at the end of its useful life to recycle, remanufacture, or dispose of it in a way not harmful to the environment (no land fills), (see McDonough and Braungart, *Cradle to Cradle: Remaking the Way we Make Things* 2002).

**Ecological Footprint:** A link between human lifestyles and ecosystems that allows people to visualize the impact of their consumption patterns and activities on ecosystems; also an analytic tool for determining if our lifestyles are sustainable. Categories of human consumption translate into areas of productive land required to provide resources and assimilate waste products. The "footprint" is the total amount of land required for food, housing, transport, consumer goods and services. This approach shows that the most advanced countries consume and have a larger footprint on the earth than the rest of the planet, (Made popular by Mathis Wackernagel and William Rees, *Ecological Footprint Analysis* 1996).

**Education for Sustainability:** EfS was first described in Agenda 21 (Rio Summit 1992) and holds that education is central to attaining a sustainable economy and society, and that all EfS efforts should be customized to be locally relevant and culturally appropriate. The primary objectives of EfS are to improve and reorient education to incorporate knowledge, training, and values that will guide and motivate people to pursue sustainable livelihoods, to participate in a democratic society, and to live in a sustainable manner. University education should train students to lead all sectors of society in a world striving toward sustainability (see Filho, *Teaching Sustainability at Universities* 2002).

**Environmental Accounting/Full Cost Pricing:** Links the economy to the biophysical environment. It enables firms to understand the full spectrum of environmental costs and integrate these costs into decision making. Adoption of environmental accounting techniques increases the visibility of environmental costs and benefits, and thus impacts pricing strategies. Unsustainable products would no longer be less expensive than their sustainable counterparts if full cost pricing was required (see Markandya, *Environmental Accounting and Sustainability: An Integrated Analysis* 2007).

**Global Warming:** The progressive gradual rise of the earth's surface temperature thought to be caused by the burning of fossil fuels and industrial pollutants. May result in the increase in the volume of water which contributes to sea-level rise.

**TABLE 3 (CONTINUED)**  
**KEY SUSTAINABILITY CONCEPTS**

**Green Product/Marketing:** Marketing a product that lessens the impact to the environment; “environmentally friendly.” It must undertake life-cycle analyses to minimize environmental impact (includes raw materials, production and distribution processes, consumption and recycle/disposal). Contributes to the long term health and viability of our ecosystem; minimizes use of non-renewable resources (see Esty and Winston, *Green to Gold* 2006).

**Macromarketing:** The effects of markets and marketing on society, the effects of social programs on marketing practice, marketing history, marketing systems and marketing phenomena in the aggregate, and marketing’s effects on quality of life (adapted from *Journal of Macromarketing* homepage: [<http://agb.poly.asu.edu/jmm>]).

**Natural Capital:** Refers to the natural resources and ecosystem services that make possible all economic activity. Natural capital is being degraded and liquidated by the wasteful use of such resources as energy, materials, water, and topsoil. Natural Capitalism (Hawken, Lovins, and Lovins 1999) espouses four interlinked principles: radically increased resource productivity; redesigning industry on biological models with closed loops and zero waste; shifting from the sale of goods (e.g., light bulbs) to the provision of services (e.g., illumination); and reinvesting in the natural capital that is the basis of future prosperity (adapted from [www.natcap.org](http://www.natcap.org)).

**Pollution Prevention [P2]:** Actively identifying equipment, processes, and activities that generate excessive wastes or use toxic chemicals and then making substitutions, alterations, or product improvements. Conserving energy and minimizing wastes are pollution prevention concepts used in manufacturing, sustainable agriculture, recycling, and clean air/clean water technologies (see Bishop, *Pollution Prevention: Fundamentals and Practice* 2004; Fuller, *Sustainable Marketing* 1999).

**Precautionary Principle:** An approach to the management of risk when scientific knowledge is incomplete; a “better safe than sorry” attitude. An internationally recognized principle for action, it states that when science has not yet determined whether a new product or process is safe or unsafe, policy should prohibit or restrict its use until it is known to be safe. Applied to trade, this has been used as the basis for prohibiting imports of GMOs, for example (see Agenda 21: Earth Summit – *The United Nations Programme of Action from Rio, United Nations* 1993).

**Resource Recovery [R2]:** Recovering resources from waste. There is a range of different resource recovery technologies that can change waste materials into resources, through thermal or biological means, resulting in many useful products (e.g., fuel, compost, energy, and chemicals for manufacturing new products. For example, Interface Carpets “takes back” its old carpets and remanufactures them into new carpets (Anderson 1998), (see Fuller, *Sustainable Marketing* 1999; Rhyner et al. *Waste Management and Resource Recovery* 1995).

**Social Entrepreneur/Entrepreneurship:** Someone who develops social innovation through entrepreneurial solutions. A S.E. takes notice of a social problem or need, decides to passionately pursue it, creatively innovates new solutions and entrepreneurially addresses the issue through an organized “business plan” approach, thus allowing the social entrepreneur to address the issue of sustainability of the social venture undertaken (see Nicholls, *Social Entrepreneurship: New Models of Sustainable Social Change* 2006).

**Social Justice:** Refers to the goal (“justice”) of achieving an equitable distribution of resources such as capital, food, water, affordable housing, health care, education, and job training around the world. Focus is on redistribution of wealth from the affluent North to the developing South. Social justice also refers to the upholding of universal human rights (see Miller, *Principles of Social Justice* 2001).

**TABLE 3 (CONTINUED)**  
**KEY SUSTAINABILITY CONCEPTS**

**Social Marketing:** The use of marketing principles and techniques to influence a target audience to voluntarily accept, reject, modify, or abandon a behavior for the benefit of individuals, groups or society as a whole. Can be used by non-profit (more typical) and for-profit organizations (see Andreason, *Social Marketing in the 21st Century* 2005).

**Sustainable/Sustainability:** Meeting the needs of the present without compromising the ability of future generations to meet their needs; ensuring the long-term viability and well-being of our ecosystem, community and society. Requires focus on: (1) environmental stewardship, (2) social equity, community health, and well-being, (3) economic viability/continuity (see Blackburn, *The Sustainability Handbook* 2007; Hawken, *The Ecology of Commerce: A Declaration of Sustainability* 1993).

**Sustainable Marketing:** The establishment, maintenance, and enhancement of customer relationships so that the objectives of the parties involved are met without compromising the ability of future generations to achieve their own objectives. Requires adoption of “triple bottom line” and “natural capitalism” approaches to decision-making; “design for environment” in product development; full-cost, environmental accounting approach to price setting; “cradle to cradle” approach in production, distribution, consumption and disposal; attention to social equity and community well-being when making all decisions (see Fuller, *Sustainable Marketing* 1999; Peattie and Crane 2005).

**Triple Bottom Line:** Triple bottom line accounting means expanding the traditional company reporting framework to take into account environmental and social performance in addition to financial performance. Coined by John Elkington, co-founder of the business consultancy *SustainAbility*. The term has been expanded and now captures an expanded spectrum of values and stewardship criteria for measuring organizational and societal success: economic, environmental, and social (see Elkington, *Cannibals with Forks* 1997).

sustainability. The most recent and in-depth study on marketing textbook coverage of sustainability content analyzed twenty-one *Principles of Marketing* texts in order to ascertain what percentage of total content was devoted to a discussion of environmental/sustainable marketing (EMS) issues (Demoss and Nicholson 2005). The authors found that EMS coverage ranges from 11 to 37 pages per text, or 1–6 percent of the total number of each textbook’s pages. Only 5 of the 21 texts reviewed mention an EMS topic in 50 percent or more of the chapters, and coverage is typically limited to a discussion of general environmental awareness among certain market segments and how EMS might impact product development, packaging, and labeling. Explicit, tactical recommendations for developing sustainable products, reverse channel systems, or pricing that reflects environmental costs are rarely included. Similar findings have been reported by Thomas (2004) and Bridges and Wilhelm (2008).

At the MBA level, the Aspen Institute’s biannual *Beyond Grey Pinstripes* survey of courses that include sustainability content indicates that some progress is being made, although integration of social and environmental topics into the core curriculum is still limited (Beyond Grey Pinstripes 2008). Over one hundred courses

are listed as including significant coverage of the topic, and there is a substantial increase since the 2005 survey in the number of stand-alone (primarily management) courses on sustainable development and environmental management strategy.<sup>2</sup> Similar findings are reported by Christensen et al. (2007) in their survey of the top 50 global MBA programs, although none of the courses discussed in their study were marketing courses. Further, a search of *Beyond Grey Pinstripes* online database for marketing courses produces only a few courses – on Social Marketing, Marketing Management, and Global/International Marketing – that mention “environmental and social issues” in their summaries or syllabi.<sup>3</sup> While these findings are suggestive of low levels of student awareness about sustainability concepts and issues, there is a need for more studies that directly assess student knowledge.

#### **NEED FOR EMPIRICAL RESEARCH**

Both Ryu and Brody (2006) and Holt (2003) call for more rigorous empirical research to assess the effectiveness of existing EfS efforts in higher education. Fien (2002) notes that most studies of sustainable education fail to develop appropriate research designs that include

**TABLE 4  
DISTINGUISHING AMONG SUSTAINABILITY-RELATED CONCEPTS**

Concept	Integration of Sustainability*	Type of Organization	Financial/Economic Objectives		Social Equity Objectives		Environmental Objectives		Consumption
			Growth/Profit	Long-term financial subsistence valued over profits	Equitable distribution of resources; community well-beings; alleviation of poverty	Issue-based, e.g. stop child labor	Ecological restoration and long-term stewardship; resource productivity	Issue-based, e.g., conserve energy	
Sustainability	yes	X	X	X	X		X		Reduce **
Sustainable Development	yes	X	X	X	X		X		Reorient **
<b>Sustainable Marketing (ideal)</b>	yes	X	X (typical)	X	X		X		<b>Reduce and Reorient</b>
Green Marketing	no	X	X						Reorient
Social Marketing	no	X	X	X			X		Reorient
Non-profit Marketing	no	X							
Macromarketing	yes	N/A	N/A	X	X		X		Reduce
Social Entrepreneurship	no	X	X (typical)	X			X		X (trend)
Corporate Social Responsibility	no		X	X			X		X
Corporate Sustainability (new)	yes		X	X	X		X		X

Sources: Christensen et al. 2007 Filho 2002; Fuller 1999; Hawken et al. 1999; Jucker 2002; Kirchgeorg and Winn 2006; Mittelstaedt and Shapiro 2004; Peattie and Crane 2005; Peattie and Crane 2008; Robinson, Rose and Lawrence 2006; Simon-Brown 2000; Springett 2005; The Chronicle 2006; UNESCO 2004; van Dam and Apeldoorn 1996; van Marrewijk 2003; Wackernagel and Rees 1996; Young and Tilley 2006.

\* Sustainability considerations are part of every organizational decision process; sustainability as overarching objective (yes/no).  
 \*\* "Reduce" means decreasing absolute levels of consumption, especially in affluent, industrialized societies (e.g., Mittelstaedt and Shapiro 2004; Peattie and Crane 2005); "reorient" means redirecting customer choice towards more sustainable lifestyles and purchasing decisions (e.g. Fuller 1999; Barbut et al. 2005). Some believe marketing has "an inherent drive toward unsustainability" (van Dam and Apeldoorn 1996, p. 45) and that some government regulation will be required for marketing to play a role in achieving macro-marketing environmental and social objectives. No entry (blank) means that this concept does not include a stated position on consumption behavior.

pre- and post-measures of key constructs or report on actual consumption behavior.<sup>4</sup> For example, ecological footprint analysis (EFA) was used by the present author to measure students' footprints at the beginning and the end of the term, with EFA activities assigned during the term that encouraged footprint reduction (Ryu and Brody 2006; Wackernagel and Rees 1996). Students reported significant decreases in their footprints, as posted on their blogs. The next step will be to develop an assessment tool in addition to EFA that can be used to measure student knowledge and consumption behavior processes both before and after students are exposed to marketing EfS curriculum. Unfortunately, progress toward integrating pedagogical tools such as EFA into the marketing curriculum is constrained by generally high levels of "eco-illiteracy" among marketing faculty.

### REASONS FOR ECO-ILLITERACY

Why have marketing educators and textbook authors failed to integrate sustainability concepts and strategies into the marketing curriculum? Jucker (2002) suggests that marketing (and business) education, particularly in the U.S., are based on creating and maintaining a set of unsustainable myths. First, GNP is assumed to be an appropriate measure of a society's well-being, although much has been written about its inappropriateness given that GNP only measures monetary transactions and does not take environmental or social costs into account (McKibben 2007). Second, growth in GNP is presented as an overarching goal and a sign of "progress," even though GNP goes up when old growth forests are clear cut, more people engage in cancer treatments, and individuals go into debt to purchase ever more expensive consumer products (Hawken et al. 1999). What is needed instead is a sustainable economy that provides long-term economic stability at living wages for all its members.

Third, Western societies' economic development model is presumed to be the only valid model for developing countries to follow. The tenets of this model include the capitalist paradigm of consumption driving production, the necessity of free markets and globalization of trade, customer sovereignty, and the perception that "progress" or "civilization" requires ever increasing investments in infrastructure, automobiles, new technology, and non-renewable resources like coal and oil (Friedman 2005; Jucker 2002; Springett 2005). Marketing activities are an integral component of this economic model, because their typical objective is to increase consumption. Fourth, all technological advances are assumed to be "good," and there is a technological "fix" for any environmental or social problems we face; questioning the benefits of adopting a new technology such as nuclear power or genetically modified seeds is perceived as "un-American" (see Mander 1991 for a cogently presented luddite perspective). Fifth, a "win" for the

environment has traditionally been perceived as a "loss" for the bottom line, in spite of the fact that numerous articles and books have now been published documenting the financial benefits of adopting sustainable business practices (Esty and Winston 2006; McDonough and Braungart 2002; Senge et al. 2008).

Last, and closer to home, the Western educational system rewards research specialization and staying within functional disciplines (Everett 2008; Springett 2005; Thomas 2004, 2005). As noted earlier, marketing education for sustainability (EfS) requires an interdisciplinary approach. In summary, EfS will require marketing educators to re-examine the validity of the "unsustainable myths" presented above and consider alternative, sustainable economic and business models, such as those offered in *Natural Capitalism* (Hawken et al. 1999), *Biomimicry* (Benyus 1997), *Deep Economy* (McKibben 2007), and *The Natural Step* (Cook 2004).

### MOTIVATING FACULTY TO ADOPT MARKETING EFS

There is still much work to be done before sustainability will be successfully integrated into the core marketing (and business) curriculum. While there are excellent papers and even books that provide curricular recommendations (e.g., *Teaching Sustainability in Universities*, Filho 2002; *147 Tips for Teaching Sustainability*, Timpson 2006), the marketing discipline needs to develop its own set of discipline-specific recommendations. Before this can be accomplished, however, marketing educators need to be motivated to develop their own expertise in marketing EfS. There is a critical need for professional development initiatives to encourage faculty to increase their sustainability expertise. These initiatives can include funding to attend conferences on the subject (e.g., the *Greening of Industry Network* international conference, ([www.greeningofindustry.org](http://www.greeningofindustry.org)), the *Association for the Advancement of Sustainability in Higher Education* conferences, ([www.aashe.org](http://www.aashe.org)), special sessions and pre-conference workshops at marketing conferences such as AMA and MEA, bringing consultants and speakers to campus to conduct faculty workshops, and monetary incentives to initiate sustainability research programs with other schools and departments (e.g., environmental sciences, industrial design). Joint research projects to encourage the transition to a sustainable campus – infrastructure, energy, food, transportation – would be a noteworthy place to begin, and could also incorporate student-led projects (Rowe 2007; Sherman 2008).

### CONCLUSION

In closing, the author's hope is that marketing educators will rise to the challenge that has been presented

here. The management discipline has experienced a marked increase in sustainability-related research and curricular innovations over the last five years (e.g., Collins and Kearins 2007; Dart 2008; Kearins and Springett 2003). In fact, 2008 saw the advent of a management journal devoted to “sustainable strategic management” (SSM), a new management sub-discipline that is concerned with . . . “strategies that are sustainable from both market and environmental perspectives” (Parnell 2008,

Abstract, p. 35). Further, unlike the *American Marketing Association*, the *Academy of Management* has been and is involved with developing Global Compact’s *Principles for Responsible Management Education* (Table 2). With AACSB calling for business schools to seek ways of incorporating sustainability into their programs (BizEd 2008), it is time for marketing educators to recognize the importance and relevance of this topic for marketing pedagogy and research.

---

## ENDNOTES

1 Of course, a significant driver of business sustainability is customer demand; sustainable organizations have a competitive advantage within certain market segments. From the 50 million plus Cultural Creatives (<http://www.culturalcreatives.org/>) to the 23 percent of Americans that are considered LOHAS (Lifestyles of Health and Sustainability) consumers, an increasing number of Americans are choosing to purchase recycled/recyclable, organic, and fair trade products (Clark and Unterberger 2007; Hartman Group 2007; [lohas.com]; Ray and Anderson 2000). These individuals are adopting sustainable lifestyles, with

spending on LOHAS products and services expected to top \$400 billion by 2010 (Natural Marketing Institute 2008).

2 Business schools voluntarily submit courses for inclusion in the “survey,” precluding any conclusions about what proportion of MBA programs cover sustainability in their courses.

3 The online search of this database ([http://www.beyondgreypinstripes.org/search/search\\_coursework.cfm](http://www.beyondgreypinstripes.org/search/search_coursework.cfm)) took place in August 2008.

4 Forty percent of customers say they are willing to buy green/sustainable products, but only four percent actually purchase them (Barbut et al. 2005).

---

## REFERENCES

Agenda 21: Earth Summit – The United Nations Programme of Action from Rio (1993), United Nations, New York.

Alexander, J. (2007), “Environmental Sustainability versus Profit Maximization: Overcoming Systemic Constraints on Implementing Normatively Preferable Alternatives,” *Journal of Business Ethics*, 76, 155–62.

Anderson, Beverlee (2007), “Approaches to Greening Marketing Education: Environmental and Social Concerns,” *Proceedings of the 2007 World Marketing Congress*, (June), 102–5.

Anderson, Ray (1998), *Mid-Course Correction: Toward a Sustainable Enterprise: The 1 Interface Model*. White River Junction, VT: Chelsea Green Publishing.

Andreason, Alan R. (2005), *Social Marketing in the 21st Century*. Beverly Hills: Sage Publications Inc.

Aspen Institute, Business and Society Program (2007), “A Closer Look at Business Education: Marketing,” [available at <http://www.beyondgreypinstripes.org/pdf/Marketing.pdf>].

Barbut, Monique, Georg Kell, and S. Dupre (2005), *Talk the Walk: Advancing Sustainable Lifestyles Through*

*Marketing and Communications*. United Nations Environment Programme, UN Global Compact and Utopies.

Benyus, Janine M. (1997), *Biomimicry: Innovation Inspired by Nature*. New York: HarperCollins Publishers Inc.

*Beyond Grey Pinstripes* (2008), Search of Core and Elective Courses at [[http://www.beyondgreypinstripes.org/search/search\\_coursework.cfm](http://www.beyondgreypinstripes.org/search/search_coursework.cfm)]. Accessed 8/08.

Bishop, Paul L. (2004), *Pollution Prevention: Fundamentals and Practice*. New York: Waveland Press Inc.

*BizEd* (2008), “The Socially Responsible Curriculum,” AACSB, (July/August), 22–30.

Blackburn, William R. (2007), *The Sustainability Handbook: The Complete Management Guide to Achieving Social, Economic, and Environmental Responsibility*. Boston: Environmental Law Institute.

Bridges, Claudia and W. Wilhelm (2008), “Going Beyond Green: The ‘Why and How’ of Integrating Sustainability into the Marketing Curriculum,” *Journal of Marketing Education*, 30 (1), 33–46.

Business Week (2007), “Beyond the Green Corporation,” *BusinessWeekOnline*, January 29, available at [[http://www.businessweek.com/magazine/content/07\\_05/b4019001.htm](http://www.businessweek.com/magazine/content/07_05/b4019001.htm)].

- Carlson, S. (2008), "How Green was my College?" *Chronicle of Higher Education*, 54, A4.
- Chouinard, Yvonne (2005), *Let My People Go Surfing*. New York: Penguin Books.
- Clark, Duncan and R. Unterberger (2007), *The Rough Guide to Shopping with a Conscience*. London: Rough Guides Ltd.
- Collins, Eva and Kate Kearins (2007), "Exposing Students to the Potential and Risks of Stakeholder Engagement When Teaching Sustainability: A Classroom Exercise," *Journal of Management Education*, 31 (August), 521–40.
- Cook, David (2004), *The Natural Step*. Devon, U.K.: Green Books Ltd.
- Corcoran, B.P., E.W. Kim, and W. Arien (2004), "Case Studies, Make-Your-Case, and Case Stories: A Critique of Case-Study Methodology in Sustainability in Higher Education," *Environmental Education Research*, 10 (1), 7–21.
- Cordano, M., K.M. Ellis, and R.F. Scherer (2003), "Teaching about the Natural Environment in Management Education: New Directions and Approaches," *Journal of Management Education*, 27 (2), 139–43.
- Christensen, Lisa Jones, Ellen Peirce, Laura Hartman, W. Michael Hoffman, and Jamie Carrier (2007), "Ethics, CSR, and Sustainability Education in the *Financial Times* Top 50 Global Business Schools: Baseline Data and Future Research Directions," *Journal of Business Ethics*, 73 (4), 347–68.
- Dart, Raymond (2008), "A Commentary on 'Piercing the Bubble': Should Management Education 'Confront' Poverty?" *Journal of Management Education*, forthcoming. Available at: [<http://jme.sagepub.com/cgi/rapidpdf/1052562908318627v1>].
- Demoss, Michelle and Carolyn Y. Nicholson (2005), "The Greening of Marketing: an Analysis of Introductory Textbooks," *Journal of Education for Business*, (July/August), 338–46.
- Ellington, John (1997), *Cannibals with Forks: The Triple Bottom Line of 21<sup>st</sup> Century Business*. Oxford: Capstone Publishing.
- Esty, Daniel and Andrew Winston (2006), *Green to Gold*. New Haven: Yale University Press.
- Everett, Jennifer (2008), "Sustainability in Higher Education: Implications for the Disciplines," *Theory and Research in Education*, 6 (2), 237–51.
- Ferrell, O.C. and Linda Ferrell (2008), "A Macromarketing Ethics Framework: Stakeholder Orientation and Distributive Justice," *Journal of Macromarketing*, 28, 24–32.
- Fien, J. (2002), "Advancing Sustainability in Higher Education: Issues and Opportunities for Research," *International Journal of Sustainability in Higher Education*, 3 (3), 243–53.
- Filho, Walter L. (2002), "Teaching Sustainability: Some Current and Future Perspectives," in *Teaching Sustainability at Universities*, Walter Filho, ed. Frankfurt am Main: Peter Lang, 15–24.
- Fischer, L.D. (2007), "Roll out the Green Carpet," *BRW*, 29, 62–63.
- Friedman, Thomas L. (2005), *The World Is Flat—A Brief History of the Twenty-First Century*. New York: Farrar, Straus, and Giroux.
- Fuller, Donald A. (1999), *Sustainable Marketing*. Thousand Oaks, CA: Sage.
- Galbraith, Sharon and David McNabb (1999), "The Environment and Marketing Education," *Proceedings of the Western Marketing Educators' Association Conference*, (April), 112–15.
- Global Finance* (2008), "Sustainable Progress," September 8<sup>th</sup> Cover Story, available at: [<http://www.gfmag.com/index.php?idPage=956>].
- Goldbach, Justin (2007), "A Closer Look at Business Education: Marketing," *Aspen Institute, Business and Society Program*, Center for Business Education. Available at: [<http://www.beyondgreypinstripes.org/pdf/Marketing.pdf>].
- Goodland, R. (2007), "More Crucial Than Oil Scarcity: Climate Change Policies for a Sustainable Libya," *Climate Policy (Earthscan/James and James)*, 7, 539–42.
- Grant, John (2007), *The Green Marketing Manifesto*. West Sussex, England: John Wiley and Sons Ltd.
- Hart, Stuart (2005), *Capitalism at the Crossroads: The Unlimited Business Opportunities in Solving the World's Most Difficult Problems*. Upper Saddle River, NJ: Wharton Publishing.
- Hartman Group, (2007), "The Hartman Report on Sustainability: Understanding the Consumer Perspective," summary available at [<http://www.hartman-group.com/products/reportsSustainability2007.html>].
- Hastilow, N. (2008), "Low Carbon Britain," *Accountancy*, 141, 108.
- Hawken, Paul (1993), *The Ecology of Commerce: A Declaration of Sustainability*. New York: HarperCollins.
- \_\_\_\_\_, Amory Lovins, and L. Hunter Lovins (1999), *Natural Capitalism: Creating the Next Industrial Revolution*. Boston: Back Bay Books.
- \_\_\_\_\_, (2007), *Blessed Unrest*. New York: Viking Press.
- Holt, Diane (2003), "The Role and Impact of the Business School Curriculum in Shaping Environmental Education at Middlesex University," *International Journal of Sustainability in Higher Education*, 4 (4), 324–43.
- [[www.insidehighered.com/news/2008/07/23/sustainability](http://www.insidehighered.com/news/2008/07/23/sustainability)] (July 23, 2008), "Sustainability Failures."
- Jackson, C. (2008), "Helping Business-Led Railways to Share Best Practice," *Railway Gazette International*,

- 164, 115.
- Jucker, Rolf (2002), "Sustainability? Never Heard of It! Some Basics we Shouldn't Ignore when Engaging in Education for Sustainability," *International Journal of Sustainability in Higher Education*, 3 (1), 8–18.
- Kearins, Kate and D. Springett (2003), "Educating for Sustainability: Developing Critical Skills," *Journal of Management Education*, 27 (April), 188–204.
- Kirchgeorg, Manfred and Monika Winn (2006), "Sustainability Marketing for the Poorest of the Poor," *Business Strategy and the Environment*, 15, 171–84.
- Knowledge@Wharton (May 19, 2003), "The Triple Bottom Line: Student Activists Demand more from B-Schools," [http://knowledge.wharton.upenn.edu/article.cfm?articleid=773], Accessed February 6, 2009.
- Leimsider, Rich (2006), "A Closer Look at Business Education: Career Services," *Aspen Institute, Business and Society Program*, Center for Business Education. Available at: [http://www.beyondgreypinstripes.org/pdf/careerreport.pdf].
- Lenk, Peter, W. DeSarbo, P. Green, and M. Young (1996), "Hierarchical Bayes Conjoint Analysis: Recovery of Part-Worth Heterogeneity from Reduced Experimental Designs," *Marketing Science*, 15 (2), 173–91.
- Louviere, Jordan D., David A. Hensher, and Joffre D. Swait (2000), *Stated Choice Methods: Analysis and Application*. Cambridge: Cambridge University Press.
- Mander, Jerry (1991), *In the Absence of the Sacred*. San Francisco: Sierra Club Books.
- Markandya, Anil (2007), *Environmental Accounting and Sustainability: An Integrated Analysis*. New York: Edward Elgar Publishing.
- McDonough, Will and Michael Braungart (2002), *Cradle to Cradle: Remaking the Way we Make Things*. New York: North Point Press.
- McKibben, Bill (2007), *Deep Economy*. New York: Times Books.
- Mendoca, L.T. and J. Oppenheim (2007), "Investing In Sustainability: An Interview With Al Gore and David Blood," *McKinsey Quarterly*, 3, 107–12.
- Miller, David (2001), *Principles of Social Justice*. Boston: Harvard University Press.
- Mintu, A.T. and H.R. Lozada (1993), "Green Marketing Education: A Call for Action," *Marketing Education Review*, 4 (Spring), 17–23.
- Mittelstaedt, John and Stanley Shapiro (2004), "2004 Macromarketing Conference Abstracts: Macromarketing Scholarship and Education for a Global Century," *Journal of Macromarketing*, 24, 190–96.
- Natural Marketing Institute (2008), "Understanding the LOHAS Market Report." Available at: [http://www.marketresearch.com/publisher/1549.html].
- Net Impact (2008), accessed on February 6, 2009 at [http://www.netimpact.org].
- Nicholls, Alex, ed. (2006), *Social Entrepreneurship: New Models of Sustainable Social Change*. New York: Oxford University Press.
- Ottman, Jacquelyn (September 9, 2008), "Power of Green Lies in Marketers' Hands," [http://www.greenmarketing.com/index.php/articles/complete/power-of-green], Accessed February 6, 2009.
- Parnell, John A. (2008), "Sustainable Strategic Management: Construct, Parameters, Research Directions," *International Journal of Sustainable Strategic Management*, 1 (1), 35–45.
- Peattie, Ken and Andrew Crane (2005), "Green Marketing: Legend, Myth, Farce or Prophecy?" *Qualitative Market Research: An International Journal*, 8 (4), 357–70.
- \_\_\_\_\_ and S. Peattie (2008), "Social Marketing: A Pathway to Consumption Reduction?" *Journal of Business Research*, article in press.
- Pernick, Ron and Clint Wilder (2007), *The Clean Technology Revolution: The Next Big Growth and Investment Opportunity*. Boston: HarperCollins Publishing.
- Ray, Paul H. and Sherry R. Anderson (2000), *The Cultural Creatives: How 50 Million People are Changing the World*. New York: Three Rivers Press.
- Raynolds, Laura T., Douglas Murray, and John Wilkinson (2007), *Fair Trade: The Challenges of Transforming Globalization*. New York: Routledge.
- Rhyner, Charles R., Leander Schwartz, Robert Wenger, and Mary Konrell (1995), *Waste Management and Resource Recovery*. Boca Raton FL: CRC Press LLC.
- Robinson, Rose (2006), "Educating Aspiring Social Entrepreneurs," Web seminar hosted by [www.CasePlace.org](http://www.CasePlace.org), September 6.
- Rowe, Debra (2007), "Education for a Sustainable Future," *Science*, 20 July, 323–24.
- Ryan, T.J. (2008), "Consumers Need To Show Some Green," *Apparel Magazine*, 49, 35–36.
- Ryu, Hyung-Cheal and Samuel D. Brody (2006), "Examining the Impacts of a Graduate Course on Sustainable Development using Ecological Footprint Analysis," *International Journal of Sustainability in Higher Education*, 7 (2), 158–75.
- Sammalisto, Kaisu and Thomas Lindhqvist (2008), "Integration of Sustainability In Higher Education: A Study With International Perspectives," *Innovations in Higher Education*, 32, 221–33.
- Senge, Peter, Bryan Smith, Nina Kruschwitz, Joe Laur, and Sara Scheley (2008), *The Necessary Revolution*. New York: Doubleday.
- Shapiro, S.J. (2008), "Marketing, Society, and Controversy: An Online Course from a Macromarketing

- Perspective,” *Journal of Macromarketing*, 28, 195–96.
- Sherman, Daniel J. (2008), “Sustainability: What’s the Big Idea?” *Sustainability*, Mary Ann Liebert, Inc., 1 (3), 188–95.
- Simon-Brown, Viviane (2000), “Sustainable Living: Strategies for Breaking the Cycle of Work and Spend,” *International Journal of Sustainability in Higher Education*, 1 (3), 290–96.
- Slater, Dashka (2007a), “How Green is My Valley,” *Sierra: The Magazine of the Sierra Club*, (May/June), 21.
- \_\_\_\_\_ (2007b), “As the World Warms: Signs of a Changing Planet,” *Sierra: The Magazine of the Sierra Club*, (May/June), 19.
- Springett, Delyse (2005), “Education for Sustainability in the Business Studies Curriculum: A Call for a Critical Agenda,” *Business Strategy and the Environment*, 14, 146–59.
- The Chronicle of Higher Education (2006), “The Sustainable University: In Search of the Sustainable Campus,” October 20, available at: [http://chronicle.com/free/v53/i09/09a01001.htm].
- Thomas, Ian (2004), “Sustainability in Tertiary Curricula: What is Stopping it Happening?” *International Journal of Sustainability in Higher Education*, 5 (1), 33–47.
- Thomas, Tom E. (2005), “Are Business Students Buying It? A Theoretical Framework for Measuring Attitudes Toward the Legitimacy of Environmental Sustainability,” *Business Strategy and the Environment*, 14, 186–97.
- Times Higher Education Supplement (2007), “Green Is the Color of Profitable Marketing,” 8 June, 12. Available at: [http://www.timeshighereducation.co.uk/story.asp?storyCode=209254&andsectioncode=26].
- Timpson, William M., Brian Dunbar, Gailmarie Kimmel, Brett Bruyere, Peter Newman, and Hillary Mizia (2006), *147 Practical Tips for Teaching Sustainability*. Madison, WI: Atwood Publishing.
- UNESCO (2004), *United Nations Decade of Education for Sustainable Development*. Available at: [http://portal.unesco.org/education/en/en/].
- United Nations Global Compact (2008a), “Principles for Responsible Business,” Available at: [http://www.unglobalcompact.org].
- \_\_\_\_\_ (2008b), “Principles for Responsible Management Education. Available at: [http://www.unprme.org].
- van Dam, Ynte and Paul Apeldoorn (1996), “Sustainable Marketing,” *Journal of Macromarketing*, 16, 45–56.
- van Marrewijk, Marcel (2003), “Concepts and Definitions of CSR and Corporate Sustainability: Between Agency and Communion,” *Journal of Business Ethics*, 44, 95–106.
- Vogel, David (2005), *The Market for Virtue: The Potential and Limits of Corporate Social Responsibility*, Washington, D.C.: The Brookings Institute.
- Wagner, M.W., S. Schaltegger, and W. Wehrmeyer (2001), “The Relationship Between the Environmental and Economic Performance of Firms,” *Greener Management International*, 34, 95–108.
- Wackernagel, Mathis and William Rees (1996), *Our Ecological Footprint: Reducing Human Impact on the Earth*. Gabriola Island BC: New Society Publishers.
- Walker, C. (2008), “The Green List: Changes for a Healthier Planet,” *Alaska Air Magazine*, (June), 26–34.
- Wilhelm, W., S. Mottner, T.J. Olney, C. Bridges, B. McKenzie, and E. Soares (2006), “From Tree Hugger to Triple Bottom Line: Bringing Sustainability into the Marketing Curriculum,” *Proceedings of the 2006 Marketing Educators’ Association Conference*, 95.
- Young, William and Fiona Tilley (2006), “Can Business Move Beyond Efficiency? The Shift Toward Effectiveness and Equity in the Corporate Sustainability Debate,” *Business Strategy and the Environment*, 15, 402–15.

# USING PARABLES TO TEACH MARKETING

*Timothy R. Graeff, Middle Tennessee State University*

## ABSTRACT

*A simple story told through a parable can be an effective pedagogical tool for teaching important marketing concepts, ideas, and lessons. By using parables that describe characters, situations, and images that are familiar and easy to understand, students can easily generalize from what is already known to that which is new and novel. This article discusses the theoretical and practical basis for teaching marketing with parables, describes a procedure for using parables in a marketing class within the context of a cooperative learning exercise, outlines a five-step procedure for writing parables to teach important marketing concepts and lessons, and presents four specific parables that can be used in a marketing principles class. Each parable illustrated in this article is a short story about an everyday life experience with which students are familiar.*

## INTRODUCTION

Marketing educators are continually looking for new teaching techniques, approaches, and methodologies to improve student learning. Interestingly, one of the most effective teaching techniques is also one of the oldest. People have used stories as a teaching tool since the beginning of time. Stories, fables, and parables have been used to effectively pass on history and important information to younger generations (Bucher 1991; Frankel 1992; Kirkwood 1983). A parable is defined as a simple story about everyday events and characters that illustrates a moral, religious truth, or important life lesson. Similarly, a fable is defined as a fictitious story, often with animal characters, that teaches a lesson.

Stories and parables can also be used to teach marketing. A simple story told through a parable can be an effective pedagogical tool for teaching important marketing and business concepts, ideas, and lessons. A distinct advantage that parables have as pedagogical tools is their ability to illustrate concepts that are often hard to understand by describing characters, situations, and images that are easy to understand. By using everyday events as part of a story, students can easily create mental pictures of the people and situations described in the story. These mental pictures help the reader understand the story and the lessons being conveyed through the story. As such, they allow the reader (or listener) to learn new ideas by generalizing from what is familiar, already known, and already understood, to that which is new and novel. In this way, parables are very effective tools for teaching the *big picture* concepts, ideas, lessons, and rules of marketing that might not be well articulated, described, or emphasized in a textbook.

The purpose of this article is to (1) discuss the theoretical and practical basis for teaching marketing with parables, (2) describe a procedure for using parables in a marketing class within the context of a cooperative learning exercise, (3) outline a five-step procedure for

writing parables to teach important marketing concepts and lessons, and (4) present four specific parables that can be used in a marketing principles class. Each parable illustrated in this article is a short story about an everyday life experience with which students are familiar.

Within the context of a cooperative learning exercise to be conducted during a class session, students first read the parable and try to visualize the characters and events described in the story. They then engage in a brief cooperative learning exercise called *think, pair, share*. To guide students through the exercise, they are provided with a series of questions which they are to answer on their own (this is the *think* part of the exercise). Then, they discuss their answers with the student seated next to them (*pair*). After coming to some agreement regarding answers to the questions and the possible moral or lesson of the parable, each pair *shares* their answers and interpretations of the parable with the rest of the class. The procedure for teaching with parables outlined in this article can be used equally well in either small or large introductory marketing classes, as well as senior level marketing management classes, and even graduate level marketing courses.

Using parables within the context of this cooperative learning exercise is an excellent way to introduce vague and hard to grasp concepts. Because the parables deal with everyday experiences with which they are familiar, students have a base of understanding that they can apply to a marketing context. In addition, the everyday nature of parables makes them easier to remember, thus providing a memory aid for key concepts in marketing.

## PARABLES AND LEARNING EXPERIENCES BEYOND THE TEXTBOOK

A typical Principles of Marketing class can easily become bogged down with a multitude of terms and definitions, where the instructor falls into a pattern of presenting a new marketing term and then defining it for

students. This is followed by another term or concept, which is then defined for students. Unfortunately, this can become rather boring for both the instructor and students. There is no active participation on the part of students, and students are not allowed to discover new ideas and concepts on their own. As such, students quickly forget the multitude of terms and definitions they learn in their classes. Many marketing educators seek to give students unique learning experiences in their classes that go beyond merely presenting material from a textbook. Parables provide such experiences for both students and teachers.

Parables provide a means by which instructors can create an environment where students actively and cooperatively learn the important lessons of marketing and business. And, because they are being taught through the use of parables that draw on students' knowledge of the familiar and well known, the lessons that are learned from parables can be easily remembered.

Parables are very effective at teaching the *big picture* lessons of life (Jarollimek 1991; Kirkwood 1985; Schank 1990; Zull 2002). For example, the story of the ant and the grasshopper effectively teaches that one should always be prepared.

#### ***The Ant and the Grasshopper***

*In a field one summer's day a Grasshopper was hopping about, chirping and singing to its heart's content. An Ant passed by, bearing along with great toil an ear of corn he was taking to the nest. "Why not come and chat with me," said the Grasshopper, "instead of toiling and mowing in that way?" "I am helping to lay up food for the winter," said the Ant, "and recommend you to do the same." "Why bother about winter?" said the Grasshopper; "we have got plenty of food at present." But the Ant went on its way and continued its toil. When the winter came the Grasshopper had no food and found itself dying of hunger, while it saw the ants distributing every day corn and grain from the stores they had collected in the summer. Then the Grasshopper knew: It is best to prepare for the days of necessity.*

An important benefit of teaching with parables is that they are easy to remember and they often serve as shorthand ways of conveying meaning about an important message. For instance, all that a parent must do is mention *The Boy Who Cried Wolf*, and children quickly know that their parents are reminding them about the negative consequences of lying. Similarly, most people can quickly recall the lessons that are taught from the story of *The Ugly Duckling*, the story of *The Tortoise and the Hare*, and the story of *The Little Engine that Could*.

### **THE THEORETICAL BASIS FOR TEACHING WITH PARABLES AND STORIES**

There is strong theoretical support for using parables and stories to improve teaching and student learning

(Bucher 1991; Frankel 1992; Jarollimek 1991; Kirkwood 1983). Stories are one of the oldest pedagogical techniques – dating back thousands of years. The Bible makes very effective use of parables and short stories to convey important lessons. Similarly, Aesop's fables are well known for their ability to convey important lessons in short stories.

The effectiveness of parables and stories as pedagogical techniques has also been studied within the context of cognitive psychology. Recalling and creating stories are key parts of learning (Schank 1990). Parables are powerful means of teaching concepts because they provide a mental structure for new knowledge. The mental structure (knowledge schema) activated by the characters, situations, and events described in the story provides a base for understanding and making sense of new concepts and ideas. Parables and stories are incredibly valuable teaching tools because they allow students to activate and engage multiple parts of the brain.

Stories engage all parts of the brain. They come from our experiences, our memories, our ideas, our actions, and our feelings. They allow us to package events and knowledge in complex neural nets, any part of which can trigger all the others. And stories are about movement. They are about verbs, the action! They focus on good and bad actions, so they generate fear and pleasure, and all the derivative emotions (Zull 2002, p. 228).

### **TEACHING MARKETING WITH PARABLES**

It is relatively easy to teach marketing with parables. A simple five-step procedure for using parables to teach marketing is outlined below.

1. Read the parable.
2. Visualize the story and the characters.
3. Answer the guided questions individually (*Think*).
4. Work with another student to answer the guided questions (*Pair*).
5. Share answers with other classmates and reflect on the lesson(s) that are learned from the parable (*Share*).

#### **1. Read the Parable**

To illustrate this five-step procedure, consider the parable of the field goals below.

##### ***The Parable of the Field Goals***

*This year the Big State University (BSU) football team lost the big game to their main rival, Little State University (LSU). BSU appeared to be the better team, but they missed all four of their field goal attempts. They lost the game by two points, so making only one of their four field goal attempts would have given them the victory. This game high-*

lighted a year of frustration – making only 20 percent of all field goal attempts during the entire season.

*The BSU coach quickly decided to deny the field goal kicker his scholarship for the next year. After hearing this, the university President quickly fired the football coach. When asked why he fired the coach, the President replied, “He clearly doesn’t understand football.”*

*This parable can be presented individually to students prior to a class session, or it can be shown to the entire class.*

## 2. Visualize the Story and Characters

After reading the parable, students are first asked to take one minute to visualize the story and the characters. They should try to paint a mental picture of the story in their mind’s eye. Visualizing the parable makes it more meaningful. The visualization process also provides an additional memory trace to help students retain the important lessons they are learning from the parable (Harney 2000).

## 3. Answer the Guided Questions Individually (Think)

After visualizing the story, students are presented with a number of guided questions that they are to answer on their own. Guided questions for the parable of the field goals are shown below.

### **Guided questions (Parable of the Field Goals):**

- ◆ *What is it about football that the coach does not understand?*
- ◆ *Other than the kicker, what are some other potential reasons (causes) for BSU’s inability to make field goals?*
- ◆ *Is kicking a field goal in football a simple task?*
- ◆ *What must go right to be able to successfully kick a field goal?*
- ◆ *Kicking a field goal is \_\_\_\_\_*
- ◆ *Marketing is \_\_\_\_\_*
- ◆ *What is the overall moral or lesson of this parable as it relates to marketing?*

Students should be given three to five minutes to answer these questions. These guided questions help students learn on their own how this story can teach an important lesson about marketing.

## 4. Pair With another Student to Answer the Guided Questions

After answering the guided questions on their own, students pair with another student to come to some agreement about their answers and the potential moral of the parable. Using parables within the context of a coop-

erative learning exercise where student share their ideas, thoughts, and opinions can significantly enhance student learning (Bobbitt, Inks, Kemp, and Mayo 2000; Graeff 1997; Graham, Graham, and Whiting 1997; Hernandez 2002; Lancaster and Strand 2001; Leon and Tai 2004; Norman, Rose, and Lehman 2004; Siciliano 2001; Wehrs 2002). Using this type of cooperative learning exercise improves student learning in a number of ways, including:

- ◆ It provides a break for students.
- ◆ It lets students generate their own morals and concepts from the parable. By working together students are actively discovering the moral or lesson of the story. This is a much more powerful way to learn than merely listening passively to a lecture.
- ◆ It lets students learn from each other’s experiences and knowledge.
- ◆ It provides students with ownership of their learning when they actively discover the moral or lesson of the story (Wood 2003).
- ◆ It makes the lesson more memorable.

## 5. Share Answers with the Entire Class

After working in pairs, students share their interpretation of the story and the possible lessons from the story with the rest of the class. The entire class reaches a consensus regarding the important lesson(s) that the story teaches about marketing. For example, the parable of the field goals teaches students that marketing is a multi-stage process – much like kicking a field goal in football. There are many stages in the process that must be completed, integrated, and coordinated to successfully kick a field goal. The long snapper must be accurate. The holder must be able to catch the ball from the snapper and place it correctly on the ground. The kicker must be able to kick the ball between the uprights. And, the offensive line must be able to block the oncoming rushers from the other team to keep them from blocking the kick. A breakdown in any one of these stages can lead to an unsuccessful field goal attempt. Similarly, marketing is a multi-stage process. Many stages (functions, activities) must be completed, integrated, and coordinated to successfully design, produce, promote, and distribute a product from a producer to a consumer. These stages include product design and development, production, distribution, pricing, advertising, selling, and even after-the-sale customer support. A break down in any one of the marketing stages can lead to an unsuccessful sale, unsatisfied customers, decreased customer satisfaction, and decreased repeat purchases.

### **The moral of the parable of field goals:**

- ◆ *The coach does not seem to understand that kicking a field goal is actually a multi-stage process that relies on the successful completion*

of tasks by many players on the team, not just the kicker.

- ◆ *There are many things that must go right to be able to successfully kick a field goal. Kicking a field goal is actually a complicated process that requires integration and cooperation among many team members. The long snapper must be accurate, the holder must be skilled enough to receive the snap and place the ball in a correct position for the kicker to be able to kick the ball through the uprights. All of this must be done while the offensive line is blocking the opposing team from blocking the kick. In addition, the offense must be able to move down the field far enough so that the kicker has a reasonable chance of making a field goal (i.e., a kicker would not be expected to make any field goals being kicked from the 50-yard line).*
- ◆ *Similarly, marketing is a process that requires the integration and cooperation of many marketing related functions. This is illustrated in multi-stage models of the consumer adoption processes (e.g., awareness – interest – trial – evaluation – desire – adoption).*
- ◆ *All marketing communications must be integrated to achieve a common goal (Integrated Marketing Communications – IMC).*
- ◆ *The four elements of the market mix must “fit” with each other.*

This parable can be used at the very beginning of the semester to provide students with a sense of structure regarding marketing as a process and not a singular activity to be performed by an individual. Marketing is an organizational activity that must be understood by all employees – from the sales person, to the administrative assistant receiving customers’ phone calls. It can also be used when introducing the marketing mix, as well as when discussing integrated marketing communications (IMC) and multi-stage models of product adoption. Because parables often lend themselves to multiple interpretations, they allow the instructor to use them at various times during the semester.

### **BENEFITS OF TEACHING WITH PARABLES**

Parables are very effective at teaching rather abstract, yet very important, lessons of life dealing with such issues as relationships, loyalty, promises, motivation, trust, power in relationships, and influence over others. This is exactly what makes using parables so effective for teaching marketing. Often, the most essential lessons to be learned about marketing and business deal with these very same issues. For example:

- ◆ **Relationships** – Attracting, creating, and maintaining relationships with customers, suppliers, buyers, and channel members.

- ◆ **Loyalty** – Customer loyalty and differing (competing) loyalty goals among channel members.
- ◆ **Promises** – Branding. A brand is a promise. Do not sell what you cannot deliver.
- ◆ **Motivation** – Purchase motivation and persuasion.
- ◆ **Trust** – Deceptive advertising and product claims.
- ◆ **Power in relationships** – Channels of distribution and influence over channel members.

Unfortunately, many marketing textbooks do not present these *big picture* lessons in an interesting, engaging, and interactive manner. Using parables to teach marketing gives the instructor a chance to give students a learning experience they cannot get from just the textbook.

Other important advantages of using parables to teach marketing include:

- ◆ They are novel. Students do not do this type of exercise in their other classes.
- ◆ Students enjoy working with these parables and trying to guess the moral. It can almost become a game to students – Guess the Moral.
- ◆ They work! Parables and stories are very effective means of helping students learn important lessons about marketing.
- ◆ Parables are not a one-and-done exercise. Different parables can be used throughout the semester for a variety of topics (e.g., promotions, channels of distribution, coupons, etc.).
- ◆ Using parables teaches students that they can apply lessons from everyday life to help them make business and marketing decisions and to better understand business and marketing.

### **THE FIVE STEPS TO WRITING PARABLES TO TEACH MARKETING**

Writing parables that can be used to help teach important concepts in marketing is not difficult. In fact, they can be easily written using a simple five step process.

#### **Step 1. What Do You Want Students to Learn?**

Identify the important point, concept, idea, lesson, or rule of marketing that you want students to learn. Do not concentrate on terms or definitions. Instead, think of the lesson to be learned in somewhat abstract or general terms. For example, consider the following lesson that you might want to teach students:

*Do not sell the product. Simply sell the idea that other consumers are buying it.*

This is something that students should learn from a marketing principles class. In fact, students have probably already noticed that many advertisements do not try

to persuade consumers on the features or benefits of the product. Rather, they merely suggest that many other consumers are buying it; therefore, it must be good. We often see advertising slogans such as: “Number one selling car in America – five years in a row.” “Most prescribed migraine medication by doctors.” “More consumers buy from Haverty’s than from any other furniture retailer in the state.”

### Step 2. When Do You Want Students to Learn This?

Identify the course topics that this lesson relates to. At what point during the course do you want students to learn this lesson? For example, the lesson – *do not sell the product, simply sell the idea that other consumers are buying it* – could be taught when discussing:

- ◆ Social influences on consumers.
- ◆ The role of reference group influences on consumer decision making processes.
- ◆ Advertising and types of advertising claims.
- ◆ Theories of persuasion.

### Step 3. Tell a Story

Write a parable or short story that illustrates the overall lesson without using marketing language, terms, or examples. Make the story vague enough to allow for your interpretation as well as students’ interpretations. Try to tell a story with which most students will be familiar. In this case, the way children try to influence their parents provides for an excellent means by which this lesson can be conveyed. Children often use arguments such as, “But Mommy, why can’t I go to the creek to play, all of the other kids are going to be there.” Then write a story that describes this type of situation. The parable of the buzz cut is an example.

#### ***The Parable of the Buzz Cut***

*Alex is in the 5<sup>th</sup> grade. Many of the other boys in his class have had their hair cut very short. The boys called it a “buzz cut.” Alex wanted to get a buzz cut too. When he asked his mother she told him that she did not want him to cut his hair that short and that he probably would not look very good with a buzz cut. Determined, he told his mother, “But Mom, all of the other boys have a buzz cut, so their mothers said it was OK.” A few days later, Alex was seen at school with a buzz cut.*

### Step 4. Guide Students’ Learning Process

Write some guided questions that will help students work through the parable to identify the key lessons and ideas conveyed by the story. Without spoon-feeding them too much, let students discover and learn the key concepts on their own. Let them try to articulate the moral of the story and then identify its relevance to marketing.

- ◆ *What does Alex understand about persuasion?*
- ◆ *Did Alex try to convince his mother about the merits, or benefits of getting a buzz cut?*
- ◆ *What did Alex tell his mother?*
- ◆ *What finally convinced his mother to let Alex get a buzz cut?*
- ◆ *What lessons can marketers learn from the techniques young children use to persuade their parents?*
- ◆ *What can this teach us about how we promote and advertise products such as cars, prescription drugs, and pharmaceuticals?*
- ◆ *Must marketers sell products by selling the product?*
- ◆ *If not, what can marketers sell?*
- ◆ *What can marketers emphasize in their promotions to consumers?*
- ◆ *Don’t sell the product, sell \_\_\_\_\_.*

### Step 5. Discuss With Students What They Just Learned

After students have identified the moral of the parable, help them articulate the moral of the parable as it relates to marketing. Summarize the main points and emphasize the general lesson that you want students to learn from the exercise. For example, discuss the following key points being illustrated by the story:

- ◆ *The use of reference group influence and referent group power can be very persuasive in marketing.*
- ◆ *Marketers do not always sell the product by selling the product. Rather, they can sell the product by simply selling the idea that everyone else is buying it.*
- ◆ *Advertising slogans such as, “Number One Selling Car for the Past Five Years,” or “Most Prescribed Pain Reliever” can be very persuasive.*

### ADDITIONAL PARABLES

To further illustrate the effectiveness of parables to teach important lessons about marketing and business, two additional parables (along with guided questions) are provided below.

#### ***The Parable of Bill, Ted, and Alice***

*Bill and Alice have been dating for about six months. Bill’s friend, Ted, is introduced to Alice. Ted is very attracted to Alice. He romances her, sweet-talks her, seduces her and “steals” her away from Bill. Ted is very pleased with himself because stealing Alice was relatively easy. Ted thinks he must be something special to be able to steal Alice away from Bill so easily. Ted plans on having a life-long relationship with Alice. He plans to ask Alice to marry him.*

### Guided Questions

- ◆ What is your advice to Ted?
- ◆ What is your advice to Bill?
- ◆ What is your advice to Alice?
- ◆ Is it a good idea to try to “steal away” a girlfriend (boyfriend) from someone else?
- ◆ How would you describe a person like Alice who easily or often switches boyfriends?
- ◆ Would you want a girlfriend like Alice? Why? Why not?
- ◆ Do marketers want customers who are like Alice? Why? Why not?
- ◆ What kind of customers do marketers want?
- ◆ Is targeting brand switchers a good strategy for long-term marketing success?
- ◆ What is the overall moral or lesson of this story?
- ◆ In this story, identify which character illustrates a (1) market leader, (2) market challenger, and (3) consumer:

### The Moral of the Parable of Bill, Ted, and Alice

- ◆ Ted should not plan on a long-term relationship with Alice because, “If she did it to him, she will do it to you.”
- ◆ It is best to find a loyal girlfriend/boyfriend.
- ◆ Marketers cannot rely on brand switchers as an effective strategy for long term growth.
- ◆ Marketers seek and need customers who are brand loyal.
- ◆ Marketing strategies will depend upon a firm’s competitive position – market leader, market challenger, market follower, or market niche.
- ◆ Bill = market leader, Ted = market challenger, Alice = consumer

Many students will be able to relate to this parable and its lessons because they have had firsthand experience with someone like either Ted or Alice. And that is exactly what makes it such a powerful teaching and learning tool. The connection to one’s personal experiences makes the parable and its lessons even more relevant, meaningful and memorable.

### The Parable of the Peach Picker

*In a town lived a wealthy land owner. He owned the only fruit orchards for miles and miles. When it came time to harvest the fruit, the harvesters were instructed to pick only the choicest and best fruits to be sold. Not long after the harvest three men were walking by the fruit orchards. Upon seeing that there were still many apples and peaches on the trees they asked the land owner if they could pick the remaining fruit. The land owner agreed, telling them that they could keep any and all fruit they could pick. As they entered the orchard all three of them noticed that there were many more apples than peaches left to be picked. So, the first man, being the fastest and strongest ran to the apple trees and began picking the apples. Not long after, the second man arrived in*

*the apple orchard and confronted the first man. The second man said that he wanted the apples and claimed that all of the apples were to be his. The two men soon began to fight. They fought viciously all day. Bruised and beaten, they both limped back home, too weary to carry any fruit. On their way home they saw the third man standing under a sign that read: Peaches for sale. Last chance! Only freshly picked peaches in town!*

### Guided Questions

- ◆ Why did the first man run to the apple orchard?
- ◆ Why did the second man also run to the apple orchard?
- ◆ Why did the third man go to the peach orchard?
- ◆ What is better, a few peaches, or no apples?
- ◆ If you were one of these three men, which orchard would you choose? Why?
- ◆ What is the overall moral or lesson of this parable?
- ◆ Rule of order: Be \_\_\_\_\_
- ◆ If you cannot be first at one thing, be \_\_\_\_\_ (Better?)

### The Moral of the Parable of the Peach Picker

- ◆ It is better to capture what you can than to fight over what you might not get.
- ◆ Do not always strive for the largest market; strive for the market that you can dominate.
- ◆ Rule of Order: Be first. If you cannot be first in one field (market), be first in a different field (market).
- ◆ Develop marketing strategies that will deter competition.
- ◆ Strive for ways to identify markets with little competition, or develop methods for deterring competition.
- ◆ 2<sup>nd</sup> place is the first loser.
- ◆ If you were not first, you never will be.
- ◆ Many people will say that it is better to be lucky than good. Successful marketers know that it is often better to be first than better.

When discussing this parable and its lessons, ask students to identify who was the first person to fly across the Atlantic Ocean. Then ask them to identify the second man to fly across the Atlantic Ocean. Most students will correctly identify Charles Linbergh as the first person to successfully make the flight in his plane named the *Spirit of St. Louis*. However, very few students will know that Bert Hinkler was the second man to do it. In fact, Bert Hinkler made the flight in less time and used less fuel than Charles Linbergh used. As such, he performed the task better than Linbergh. However, because he was not first, history gives him very little consideration for his accomplishment. Then ask students who was the first woman to make the same flight. They will probably be able to identify Amelia Earhart. Why can they remember her, but not Bert Hinkler? The answer is that she was the first

woman to make the flight. Because she was the first in a different category (first woman vs. first person), history remembers her (Ries and Trout 1994). History usually remembers the first, not the best.

## CONCLUSION

As marketing educators seek new teaching techniques, approaches, and methodologies to improve student learning, it is ironic that one of the best pedagogical techniques is also one of the world's oldest. Even though parables and stories have been used for educational

purposes since the beginning of time, they can still be used to effectively teach students important concepts and lessons about marketing in today's business environment. Perhaps the greatest benefit to using parables to teach marketing is their ability to illustrate concepts and lessons that are often hard to understand by describing characters, situations and images that are familiar and easy to understand. They allow students to learn new ideas by generalizing from what is familiar, already known, and already understood, to that which is new and novel.

---

## REFERENCES

- Bobbitt, Michelle L., Scott A. Inks, Katie J. Kemp, and Donna T. Mayo (2000), "Integrating Marketing Courses to Enhance Team-Based Experiential Learning," *Journal of Marketing Education*, 22 (April), 15–24.
- Bucher, Anton A. (1991), "Understanding Parables: A Developmental Analysis," *New Directions for Child Development*, 52 (Summer), 101–6.
- Frankel, Richard M. (1992), "Making Complex Concepts Understandable: The Use of Rhetorical Devices in Optometric Education," *Optometric Education*, 17 (2), 59–61.
- Graeff, Timothy R. (1997), "Bringing Reflective Learning to The Marketing Research Course: A Cooperative Learning Project Using Inter-Group Critique," *Journal of Marketing Education*, 19 (1), 53–64.
- Graham, Reginald A., Beverly L. Graham, and Victoria R. Whiting (1997), "Cooperative Learning: The Benefits of Participatory Examinations in Principles of Marketing Classes," *Journal of Education for Business*, 72 (3), 149.
- Harney, Kevin F. (2000), "Visualizing Psychological Concepts in Stories, Parables, and Riddles," *Counseling and Values*, 44 (3), 222–27.
- Hernandez, Sigfredo A. (2002), "Team Learning in a Marketing Principles Course: Cooperative Structures That Facilitate Active Learning and Higher Level Thinking," *Journal of Marketing Education*, 24 (April), 73–85.
- Jarolimek, John (1991), "Focusing on Concepts: Teaching for Meaningful Learning," *Social Studies and the Young Learner*, 3 (3), 3–5.
- Kirkwood, William G. (1983), "Storytelling and Self-Confrontation: Parables as Communication Strategies," *Quarterly Journal of Speech*, 69 (1), 58–74.
- \_\_\_\_\_ (1985), "Parables as Metaphors and Examples," *Quarterly Journal of Speech*, 71 (4), 422–40.
- Lancaster, Kathryn A.A. and Carolyn A. Strand (2001), "Using the Team-Learning Model in a Managerial Accounting Class: An Experiment in Cooperative Learning," *Issues in Accounting Education*, 16 (4), 549.
- Leon, Linda A. and Lawrence S. Tai (2004), "Implementing Cooperative Learning in a Team-Teaching Environment," *Journal of Education for Business*, 79 (5), 287.
- Norman, Carolyn S., Anna M. Rose, and Constance M. Lehman (2004), "Cooperative Learning: Resources from the Business Disciplines," *Journal of Accounting Education*, 22 (1), 1.
- Ries, Al and Jack Trout (1994), *The 22 Immutable Laws of Marketing: Violate Them at Your Own Risk!* New York: Harper Collins.
- Schank, R.C. (1990), *Tell Me a Story: Narrative and Intelligence*. Evanston, IL: Northwestern University Press.
- Siciliano, Julie I. (2001), "How to Incorporate Cooperative Learning Principles in the Classroom: It's More than Just Putting Students in Teams," *Journal of Management Education*, 25 (1), 8.
- Wehrs, William (2002), "An Assessment of the Effectiveness of Cooperative Learning in Introductory Information Systems," *Journal of Information Systems Education*, 13 (1), 37.
- Wood, Charles M. (2003), "The Effects of Creating Psychological Ownership among Students in Group Projects," *Journal of Marketing Education*, 25 (December), 240–49.
- Zull, James E. (2002), *The Art of Changing the Brain: Enriching the Practice of Teaching by Exploring the Biology of Learning*. Sterling, VA: Stylus Publishing.

# EVALUATING EXPERIENTIAL LEARNING ACTIVITIES

*Mark R. Young, Winona State University*

*Eve M. Caudill, Winona State University*

*J. William Murphy, Winona State University*

## ABSTRACT

*While it's thought that experiential learning pedagogies encourage greater student engagement that results in deep meaningful learning, it may be that they sometimes yield short-term surface learning. This notion that experiential learning activities in and of themselves do not always produce. Meaningful learning is explored by examining the learning processes evoked by the activity. Evidence is presented that suggests those students who completed the four stages of the experiential learning cycle utilized a deeper approach to learning and perceived they learned more, in contrast to abbreviated learning cycles that produced a surface approach to learning. Examining the mediating effect of students' approaches to learning may explain the varied nature of experiential learning activities even though the short-term learning outcomes seem to have been achieved. Implications for the classroom as well as the scholarship of teaching and learning are provided.*

## INTRODUCTION

Engaging students in the learning process and increasing their educational responsibility through the use of experiential learning activities is a growing trend in marketing education and is advocated by the recent AACSB accreditation standards. Experiential learning can be a powerful pedagogy for teaching marketing's broad body of concepts, principles, and analytics by internalizing theory through guided practice. Experiential-based pedagogical articles involving living cases (LeCair and Stottinger 1999), service learning (Schwartz and Fontenot 2007), interactive web-based cases (Owen 1999), integrating practitioners into the course (Linrud and Hall 1999), students as consultants (Kumcu and Kumcu 1998), e-ventures (Dilts et al. 2007), and an entire special issue of the *Journal of Marketing Education* (April 2000) have been devoted to experiential learning techniques, purporting to motivate learners and improve skills.

However, even the originator of experiential learning theory, John Dewey (1933), acknowledged that experience in and of itself is not always educative. Most recently project-related learning was not found to be related to learning retention implying that projects may represent a hit-or-miss method of learning (Bacon and Stewart 2006). Successful completion of problem-solving tasks was found not to be a valid indicator of students' conceptual understanding of underlying concepts in the sciences (McDermott and Shaffer 1992), and service-learning experiences devoid of explicit reflection may not foster academic learning (Sheckley, Allen, and Keeton 1993). In fact, if students do not think seriously about

their experiences, their experiences may reinforce stereotypes and incorrect suppositions (Glenn and Nelson 1988). Eisenstein and Hutchinson (2006) draw the conclusion that "Contrary to popular wisdom, compared with traditional learning, experiential learning is likely to be a risky proposition because it can be either accurate and efficient or errorful and biased." To successfully learn from experiential activities, the learning process must be rigorously planned to incorporate multiple aspects of the learning cycle. Therefore, it is important to understand how experiential learning activities can support and enhance learning environments if we are to deploy them effectively. Scholarly evaluation is the key to developing a better understanding of the many intentional and inadvertent aspects of experiential activities that can positively or negatively affect the learning process. The purpose of this article is to present and test an evaluation model for experiential learning activities based on an integration of two widely used learning theories: Kolb's Experiential Learning Theory (1984) and the Student Approaches to Learning Theory (Briggs 1987).

## THEORETICAL CONSIDERATIONS FOR EVALUATION

Faculty's decisions on the type of learning objectives and the classroom pedagogy they incorporate, such as experiential learning activities, reflect an underlying educational philosophy based on corresponding learning theories. These activities, often loosely structured experiential activities (Hamer 2000) are broader in scope, are completed over a longer period of time and give students greater control over what they learn than do more tradi-

tionally based pedagogies, e.g., lectures and exams. These types of experiential learning activities fit into the framework of Kolb's (1984) Experiential Learning Theory which states that "learning is the process whereby knowledge is created through the transformation of experience." Kolb's Theory, however, does not answer the question of how well, from the students' perspective, the learning activity provides opportunity for the completion of each of the four essential stages of Kolb's learning cycle.

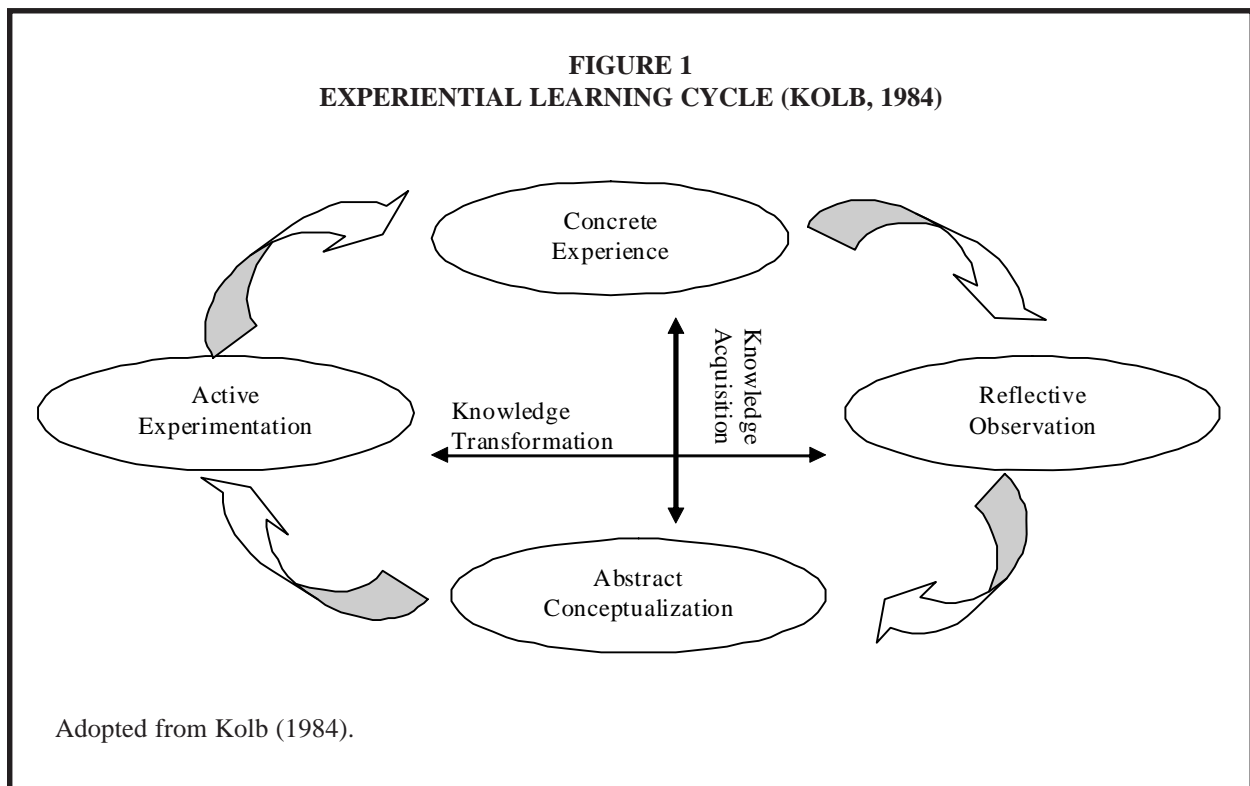
By incorporating the Student Approaches to Learning Theory (Biggs 1987) to this framework, we can better understand how the experiential learning environment affects the learning process by looking at student motivation and types of learning strategies. These two theories also allow us to examine students' perceptions of their learning gained through the experiential activity.

### Experiential Learning Theory

Kolb's experiential learning theory (1984) provides a conceptual model and practical framework for designing, implementing, and evaluating marketing education pedagogy. As previously noted, Kolb defines experiential learning as a "process whereby knowledge is created through the transformation of experience" (p. 38), which suggests that learning occurs through a sequence of four steps that create a learning cycle as depicted in Figure 1. These four steps include concrete experiences, reflective observation, abstract conceptualization, and active ex-

perimentation. Concrete experiences are the basis for subsequent reflections which are assimilated and distilled into abstract concepts from which new implications for action can be drawn. These implications can be actively tested and serve as guides in creating new experience (Kolb et al. 2000). While learning can start at any step in the learning cycle with an individual's preference of where to start based on his/her preferred learning style (i.e., diverger, assimilator, converger, accomodator), learning is most effective when all four steps are completed (Kolb 1981).

As indicated in Figure 1, the two stages of concrete experience and abstract conceptualization involve knowledge acquisition while reflective observation and active experimentation involve knowledge transformation. More specifically, concrete experiences correspond to knowledge acquisition through sensory perceptions and direct practical experiences with the world, i.e., experiential activities, and it provides the basis for the learning process. These experiences provide "knowledge by acquaintance" and are designed to engage and motivate as well as evoke some affective (feeling) aspect toward the experience. The more personally relevant the experience, the more likely the students' minds and emotions will be engaged. Activities that provide students with concrete experiences include cases, simulations, in-class demonstrations, lectures with anecdotes, videos, discussion of experiences, and current news articles. Concrete experiences gained through these activities allow students' to bridge a perceived gap between their academic learning



and the “real world.” Similarly, knowledge can also be acquired through abstract conceptualization (“knowledge about something”) in which the learners broaden their learning by integrating theories and concepts into the process. In this stage, learners are asked to transform their experiences from the concrete to a more symbolic system through the use of model-building assignments, critiques of models and theories and concept mapping.

Reflective observation, defined as the intentional consideration of an experience in light of particular learning objectives (Hatcher and Bringle 2000) is a knowledge transformation stage, which creates meaning through observation and inward reflection upon previously acquired knowledge and concentrates on what the experience means to the individual. Careful objective reflection through a variety of perspectives allows the learner to objectively analyze their experiences and how they relate to other experiences as well as how these experiences can be integrated into further learning stages. Activities which encourage reflection include personal journals, directed writings, structured classroom discussion, along with self-assessment techniques. The last stage, active experimentation, which also involves knowledge transformation, focuses on the external interaction with the environment and involves testing or use of concepts/theories in practice. While concrete experiences involved classroom activities, active experimentation allows learners to test concepts through “real world” activities such as fieldwork, projects, “active” case studies, simulations, labs, and consulting projects. The emphasis is on “doing,” with learners integrating theories, concepts, or processes with these “real world” activities to create practical outcomes. The purpose of active experimentation is to move inactive learners – possibly both physically and mentally – into more active and involved learners.

Creating an encouraging learning environment that engages and motivates students, while focusing on curriculum concepts, is the essence of the four stages of Kolb’s experiential learning cycle. Turning experiences and experimentation into educational activities that teach the curriculum’s conceptual knowledge is a task that must be well planned and explicitly incorporated into the teaching pedagogy, however, for deep learning to occur.

### **Student Approaches to Learning Theory**

The second theory discussed in this paper, Student Approaches to Learning theory, emphasized the context or learning environment in which learning takes place and its effect on the level of learning that occurs as a result. Marton and Saljo (1976) identified two discrete approaches that students followed when performing normal learning tasks such as reading academic articles. In their phenomenographic study of learning, one group of students actively sought the meaning of the reading

assignment by evaluating the evidence presented and the conclusions drawn and then related the main points of the article to their own previous knowledge and experience. Students who concentrated on the underlying purpose and meaning of the article were classified as using a *deep approach* to learning. It was surmised that deep learning approaches facilitated not only the ability to understand the material but also to apply the information that was learned. In contrast, the other group of students focused on facts and ideas to memorize what they thought was important and what they would be required to reproduce at the end of the activity. This *surface approach* to learning did allow the students to give details from the readings, but they failed to grasp the main principles from the article. While surface learning satisfies course requirements, it is a relatively passive approach and uses low-level cognitive skills which don’t require the thoughtful reflection needed to encourage greater learning. While it may result in good memorization of terms and concepts, it is less helpful in providing deeper understanding of the material or how the information is applied. See Biggs (1987) and Kember and Leung (1998) for a complete discussion of the underlying theory of students’ approaches to learning a limited overview of the theory is described here.

Since Marton and Saljo’s initial work, the two learning approaches, i.e., deep and surface, have been described as differing on the degree of motivation and strategy involved in the learning process. These two elements are interrelated: motivation refers to the reasons why students approach their learning tasks, while strategy refers to how they approach the accomplishment of the learning task. With regarding to motivation, the basic theory suggests that surface and deep learning approaches to reflect learners’ extrinsic and intrinsic motivation respectively (Biggs 1999). That is, extrinsic motivation involves performing an activity to attain some separable outcome such as a grade or teacher’s approval. Surface learners focus on the demands of assessment and try to provide what the task requires, thus exhibiting extrinsic motivation. Conversely, intrinsic motivation occurs when students complete a task because it’s interesting and/or challenging rather than for just the outcome or reward that is gained. Biggs (1987) integrated these two concepts and developed a Study Process Questionnaire to measure students’ approaches to learning. Applications of the theory and questionnaire have been undertaken in several different cultural settings including Asian (Kember and Leung 1998), African (Watkins and Mboya 1997), and Western (Andrews et al. 1994).

So why does one learning style occur rather than the other? Surface learning is more likely to occur when learning is isolated from practice or “real-world” (Atherton 2005). Concurrently, surface learners tend to be highly dependent on the lecturer for learning and stick only to the assigned readings. Moreover, surface-level motiva-

tion is positively related to their surface-level study strategies, for example, learning strategies such as rote memorization or rehearsal are used for the purpose of performing well on an exam or completing assignments without thinking about the purpose or relating it to broader contexts. Learning tends to be very compartmentalized and consists mainly of isolated facts that aren't linked together by the learner. In contrast, deep learners are eager to go beyond the syllabus and acquire new knowledge on subjects they thought were interesting. The strategies here are focused on understanding and incorporating critical thinking, reflection, elaboration, and organization type activities to comprehend the material or experience. These study strategies provide satisfaction from understanding a subject and are stimulated by intrinsic motivation.

Interestingly, student approaches to learning are not thought to be stable dispositions. It is possible for the same student to use surface and deep approaches when processing material within a course or across courses. Thus, we find that student motivation and learning strategies are sensitive to contextual variables in the teaching and learning environment (Kember et al. 1997). Biggs (1999) suggests that the generic aim of good teaching is to encourage students to utilize a deep approach to learning and to discourage the use of a surface approach to learning. Student approaches to learning, i.e., deep and surface learning, which describes the learning process, seems appropriate for assessing and tracking the educational pedagogies used in the classroom.

## HYPOTHESES DEVELOPMENT

With support from the pedagogical literature, we propose the following definition and hypotheses. First, we use the Educational Resource Information Center's (2006) definition of learning as "the process of acquiring knowledge, attitudes, or skills from study, instruction, or experience" to form the dependent variable students' perception of learning. We broaden this definition of learning to include the deep learning approach, which incorporates higher cognitive strategies and intrinsic motivation which have been empirically linked to higher quality of learning and positive academic outcomes (Ainley 1993; Das, Naglieri, and Murphy 1995; Hwang and Vrongistinos 2002). The above literature provides evidence of a positive relationship between deep approaches to learning and "objective" course outcomes as well. In addition, we supplement this evidence with our discussions with students that suggest that students do recognize when they are or are not actually learning regardless of their course grade/performance. Therefore, we hypothesize:

Hypothesis 1a: Deep approaches to learning will be positively associated with students' perceived learning.

Hypothesis 1b: Surface approaches to learning will be negatively associated with students' perceived learning.

Experiences that provide multiple opportunities and ways to acquire knowledge (experience and conceptualization) and transform knowledge (reflection and experimentation) can accommodate different learning styles. Students employing a balanced learning profile in both dimensions tend to be more sophisticated (deep approach) learners (Kolb, Boyatzis, and Mainemelis 2000). Kolb (1981) also states that learning is most effective when all four states of the learning cycle are completed. Therefore, we hypothesize:

Hypothesis 2a: Experiential learning activities that incorporate all stages of the learning cycle will be positively related to a deep approach to learning.

Hypothesis 2b: Experiential learning activities that incorporate all stages of the learning cycle will be negatively related to a surface approach to learning.

The learning climate's (instructor, learning, and performance) effect on self-regulated learning strategies was found to be mediated by students' cognitions and motivations (Young 2005). Consistent with Dewey's (1933) statement that experience in and of itself is not always educative, we hypothesize that unless the experience motivates and stimulates deeper level learning strategies, students will not perceive they have learned something from the activity. Only indirectly through the effects on students' approaches to learning will the experiential activity affect students' perception of learning. Therefore, our third hypothesis is:

Hypothesis 3: Students' approach to learning mediates the effect the experiential learning activity will have on students' perception of learning.

## METHOD

### Background and Context

Principles of Marketing courses taught by three different professors were used in this research study. Departmental goals for these courses were twofold: (1) develop students' declarative knowledge focusing on the terms/concepts and frameworks central to marketing and (2) enhance students' procedural knowledge skills by incorporating a decision making component, e.g., a marketing plan, into the course which utilized the above concepts and frameworks. Additionally, the three instructors shared the objective of accomplishing these two goals in the context of experiential learning in which the students were actively engaged and co-responsible for their learning.

To accomplish the above goals, each of the instructors deployed semester-long experiential learning activities, along with lectures, mini-assignments, and exams. These experiential learning activities included a personal

marketing plan, a marketing simulation, and a “hands on” project consisting of a bake sale, all of which met the common course goals and the instructors’ desire to improve the learning process. One section incorporated the writing of a personal marketing plan following the Brand You manual (Harris-Tuck 2006), two sections completed an on-line computer simulation Market Share (Deighan et al. 2006), and the fourth section wrote and implemented a marketing plan for the bake sale project.

### Data Collection

The data used to test the experiential learning evaluation framework (see Figure 1) was collected at the end of the semester long experiential learning activities by means of an on-line survey. Three different classes of Principles of Marketing representing the three different pedagogies described above provided a total sample 167 completed responses, see Table 1. Demographically, the sample consisted of traditional undergraduates; 58 percent male and 42 percent female; 18 percent marketing majors or minors, with the remaining majors in one of the other College of Business areas; 72 percent with grade point averages in the range of 2.5 – 3.5; and the majority (77%) were sophomores and juniors. The researchers/authors were the instructors for the four sections assessed in this study.

### Measures

Students responded to a five-section on-line self-report questionnaire with scales for each of the major variables grouped together with individual items randomly ordered within the scale. For consistency, scales were modified so they were presented in the first person and referenced the specific learning activity used in each particular class. All items and sections of the questionnaire are presented in Tables 1–4.

**Experiential Learning Stages.** The four stages of Kolb’s (1984) experiential learning theory formed the

foundation of the questionnaire describing the experiential learning activity. While scales were available to assess individual learning styles based on preferences for the different stages in the experiential learning cycle, a scale that evaluated the learning experience on all four stages of the learning cycle was unavailable. Therefore, we developed a scale specifically to capture students’ perceptions of how well an experiential learning activity included each of the four stages of the experiential learning cycle.

The development of the experiential learning stages scale began with a clear definition of the scope of the latent variable, i.e., experiential learning (Educational Resource Information Center 2006), which is conceptualized as a continuous process whereby knowledge is created through the transformation of experience through the four stages portrayed in Figure 1. Thus, concrete experience, reflective observation, abstract conceptualization, and active experimentation form the four sub-dimensions of the overall scale. Next, items used as indicators for each of these sub-dimensions were specified to ensure coverage of the entire scope of the experiential learning stages. A pool of items was generated by reviewing the literature on experiential learning (e.g., Kolb’s Learning Styles Inventory (1981) and Kember et al. (2000) Level of Reflective Thinking scale). The items were then circulated among the three authors in an iterative process of categorizing and clarifying the wording of each item until we had a consensus of three representative items for each of the four stages. The twelve items were then modified to reflect the specific experiential learning activity to be assessed and measured on a five-point completely agree/disagree scale. The scale was then pre-tested with a class of twenty-one Marketing 101 students. After the students completed the questionnaire, a debriefing session with the respondents revealed that they clearly understood the wording and the meaning of the items.

A factor analysis of the pre-test data produced one factor and a coefficient alpha of .93 for the total scale and

**TABLE 1**  
**STUDENT DEMOGRAPHICS OF PRINCIPLES OF MARKETING SECTIONS**

Section	n	% Male	% Marketing Major/Minor	% GPA 2.5 – 3.5	% Sophomore/Junior
Personal Marketing Plan	39	56%	10%	72%	74%
Bake Sale	40	63%	25%	60%	83%
imulation	88	56%	17%	77%	76%
Overall	167	58%	18%	72%	77%

alphas ranging from .72 to .86 for the four sub-dimensions. The items for the experiential learning stages scales are presented in Table 2 along with their coefficient scores. This principle component factor analysis produced one primary factor using the eigenvalue greater than one criteria and the single factor accounted for 66 percent of the variance. The overall scale's coefficient alpha was .95 with each of the subscales alphas in the eighty percent plus range (see Table 2). Although the experiential learning scale appears unidimensional in that it is measuring learning, the separation out of the subscales allow for conceptual clarity and also provide faculty a tool for diagnosing the meaning of the overall evaluation. The correlations and descriptive statistics for this study's Principles of Marketing experiential learning activities are reported in Table 5.

**Student's Approaches to Learning Scale.** Biggs, Kember, and Leung's (2001) revised two-factor Study Process Questionnaire was used to measure student's approaches to learning. Biggs initially developed the questionnaire in 1987 and through extensive application and revision now provides a 20-item scale. The 2001 analysis of the scale reported that the two factor model (deep approaches and surface approaches) provided a good fit to the data. Their data for the Deep Approach dimension, which consisted of a composite of two sub-

dimensions motivation (5-items,  $\alpha = .62$ ) and strategy (5-items,  $\alpha = .63$ ) produced a coefficient alpha of .73. Their Surface Approach dimension, with the same two sub-dimensions motivation (5-items,  $\alpha = .72$ ) and strategy (5-items,  $\alpha = .57$ ) had an alpha of .64. Per the scale developers' recommendation, we modified the items to focus on the experiential learning activity for the current research. This modified Student Approaches to Learning scale's items appear in Table 3.

As indicated in Table 3, the scale proved to be reliable, with a coefficient alpha of .88 for the items measuring Deep learning and a .85 for the items measuring Surface learning. In addition, a two-factor confirmatory factor model was fitted to the data and yielded an adequate fit for the model with a comparative fit index of .99, a chi-square minimum ratio of .002, and a standardized root mean squared residual approximation of .000. Furthermore, the Biggs et al. (2001) results showed a correlation between Deep and Surface Approaches to be a -.23, which was consistent with the -.15 correlation from this data set. These results indicate that the scale and its sub-dimensions adequately capture the two approaches to learning constructs.

**Student's Perceived Learning.** Student's perception of their learning was measured using two scales utilized by Young et al. (2003) in work on enhancing

**TABLE 2  
MEASURES OF EXPERIENTIAL LEARNING STAGES**

**Experiential Learning Stages (Four Sub Dimensions Combined  $\alpha = .95$ )**

Sub Dimension: Concrete Experience ( $\alpha = .87$ )

- This activity provided me with a direct practical experience to help understand the course concepts.
- This activity gave me a concrete experience that helped me learn the class material.
- This activity presented me with a "real world" experience related to this course.

Sub Dimension: Reflective Observation ( $\alpha = .85$ )

- This activity assisted me in thinking about what the course material really means to me.
- This activity helped me relate my personal experiences to the content of this course.
- This activity aided me in connecting the course content with things I learned in the past.

Sub Dimension: Abstract Conceptualization ( $\alpha = .83$ )

- This activity required me to think how to correctly use the terms and concepts from this class.
- This activity caused me to think how the class concepts were inter-related.
- This activity made me organize the class concepts into a meaningful format.

Sub Dimension: Active Experimentation ( $\alpha = .84$ )

- This activity made it possible for me to try things out for my self.
- This activity permitted me to actively test my ideas of how the course material can be applied.
- This activity allowed me to experiment with the course concepts in order to understand them.

NOTE: Scale used a 5-point completely agree/disagree scale. "This activity" was replaced with the specific activity being evaluated, e.g., "Brand You Personal Marketing Plan." N = 167.

**TABLE 3**  
**MEASURES OF STUDENTS' APPROACHES TO LEARNING**

**Deep Approach to Learning (Motivation and Strategy) ( $\alpha = .88$ )**

Sub Dimension: Deep Motivation ( $\alpha = .87$ )

- This course activity gave me a feeling of deep personal satisfaction.
- This course activity helped me create questions that I wanted answered.
- This course activity made me work hard because I found the material interesting.
- This course activity was at times as exciting as a good novel or movie.
- This course activity was interesting once I got into it.

Sub Dimension: Deep Strategies ( $\alpha = .75$ )

- This course activity provided me with enough work on the topic so I could form my own conclusions.
- This course activity caused me to look at most of the suggested readings that pertained to the activity.
- This course activity caused me to spend time relating its topics to other topics which have been discussed in different classes.
- This course activity allowed me to test myself on important topics until I understood them completely.
- This course activity's topics were interesting and I often spent extra time trying to obtain more information about them.

**Surface Approach to Learning (Motivation and Strategy) ( $\alpha = .85$ )**

Sub Dimension: Surface Motivation ( $\alpha = .83$ )

- For this course activity it was not helpful to study topics in depth because all you needed was a passing acquaintance with topics.
- I was able to get by in this course activity by memorizing key sections rather than trying to understand them.
- For this course activity there was no point in learning material which was not likely to be on the exam.
- I did not find this course activity very interesting so I kept my work to a minimum.
- My aim for this course activity was to complete it while doing as little work as possible.

Sub Dimension: Surface Strategies ( $\alpha = .69$ )

- This course activity suggests the best way to pass exams is to try to remember answers to likely test questions.
- I believe that the instructor shouldn't expect me to spend significant amounts of time on this course activity if it's not on an exam.
- For this class activity I restricted my study to what was specifically required as it was unnecessary to do anything extra.
- For this course activity I learned things by going over and over them until I knew them by heart even if I did not understand them.
- For this course activity I only applied what was given in class or on the course outline.

NOTE: Scale used a 5-point completely agree/disagree scale. N = 167.

learning outcomes. Table 4 displays the items in the two scales with the first 5-item scale measuring students' perception of their knowledge and skills gained from the experiential learning activity and the second scale measuring the pedagogical affect or attitude toward the learning activity. The attitude scale uses a 7-point semantic differential scale anchored with four adjectives originally developed by Mitchell and Olsen (1981). Young reported coefficient alphas of .89 for perceived knowledge/skills and .80 for attitudes along with a two-factor

principles components analysis solution. The current study produced alphas of .89 and .98 respectively, but only one factor was extracted with principle components analysis. These results indicate that the overall coefficient alpha for the combined scale was .95. Therefore, the overall scale and its two sub-dimensions provide good internal reliability. As a final check of the measurement model, we performed a confirmatory factor analysis utilizing the two sub-scales of perceived learning and the four sub-scales of experiential learning stages. The data

**TABLE 4  
MEASURES OF STUDENTS' PERCEIVED LEARNING**

<b>Perceived Learning Scale (Both sub dimensions combined <math>\alpha = .95</math>)</b>
<p>Sub Dimension: Perceived Knowledge and Skills (<math>\alpha = .89</math>)            Evaluate the activity on . . .            . . . the knowledge you gained.            . . . the skills you developed.            . . . the effort you expended.            . . . your ability to apply the material.            . . . your desire to learn more about this subject.</p> <p>Sub Dimension: Attitude Toward Activity (<math>\alpha = .98</math>)            Overall, I thought the activity was:            Useful/Useless            Effective/Ineffective            Satisfactory/Unsatisfactory            Good/Bad</p>
<p>NOTE: Scale used for Perceived Knowledge/Skills was a 6-point extremely high/low scale and the Attitude scale used a 7-point semantic differential scale. N = 167.</p>

**TABLE 5  
CORRELATIONS AND DESCRIPTIVE STATISTICS OF SUBSCALES**

	CE	RO	AC	AE	DM	DS	SM	SS	K/S	AT
<b>Concrete Experience</b>										
Reflective Observation	.85*									
Abstract Conceptualization	.78*	.78*								
Active Experimentation	.81*	.80*	.81*							
Deep Motivation	.77*	.74*	.66*	.70*						
Deep Strategy	.62*	.64*	.66*	.63*	.70*					
Surface Motivation	-.21*	-.23*	-.25*	-.29*	-.15*	-.19*				
Surface Strategy	-.14	-.16*	-.19*	-.25*	-.05	-.06	.63*			
Knowledge/Skills	.59*	.60*	.60*	.60*	.63*	.67*	-.30*	-.14		
Attitude	.69*	.67*	.69*	.67*	.70*	.68*	-.29*	-.10	.80*	
M	7.2	7.6	7.4	7.1	14.4	13.9	18.1	17.1	18.1	13.3
SD	2.7	2.5	2.5	2.6	4.0	3.1	3.6	2.9	5.5	6.7
# items	3	3	3	3	5	5	5	5	5	4
$\alpha$	.87	.85	.83	.84	.87	.75	.83	.69	.89	.98

NOTE: \*Statistically significant at .05, N = 167.

fit the model well as indicated by the fit statistics: comparative fit index of .996, a chi-square minimum ratio of 1.41 and a standardized root mean squared residual approximation of .05. Thus, the evidence suggests the scales are appropriate for operationalizing and testing the proposed assessment model.

## RESULTS

The proposed model and the hypothesized relationships were examined with structural equation modeling. AMOS (Small Waters Corporation 1999) software was used to estimate the model's parameters and to assess the

adequacy of the model fit. The extent to which the model is a good fit to the data was measured by three fit statistics. Carmines and McIver (1981, p. 80) recommend a relative chi-square to degrees of freedom ratio (CMIN) and suggest that a value of less than 3 is indicative of an acceptable fit. In addition, Hu and Bentler (1999) suggest a two-index fit strategy relying on the comparative fit index (CFI) and the standardized root mean squared residuals (SRMSR). The rule of thumb for acceptable fits based on these two indices is that values of CFI above .95 and SRMSR of less than .08 would indicate a reasonable fit of the data to the hypothesized model.

The standardized solution for the model tested is shown in Figure 2. The fit indices were CMIN = .1.65, CFI = .985, and SRMSR = .063 indicating the hypothesized model is an acceptable fit to the data. All of the parameter estimates displayed are significant at the .05 level. It should be noted the negative correlation between Deep and Surface Approaches was not statistically significant and, therefore, is not displayed in the model. In addition gender, grade point average, major, and credit hours were controlled for in a separate analysis of the data utilizing Path Analysis. Consistent with the results reported by Sachs, Law, and Chan (2003) none of these control variables' effects were statistically significant; therefore, they are also excluded from the structural equation modeling.

The squared multiple correlation coefficient for Perceived Learning with Deep and Surface Approaches to Learning and Experiential Learning Stages is .79 indicating a significant percent of the variance is being accounted for or explained by the independent variables. The path coefficient between a Deep Approach to Learning and Perceived Learning is .86 suggesting that students who find the experiential activity intrinsically motivating and utilize more cognitive learning skills perceive they learn more and they have a positive attitude toward the learning experience, supporting Hypothesis 1a. In addition, the -.12 coefficient for the Surface Approach to Learning effect on Perceived Learning is also consistent with Hypothesis 1b in that students who complete the activity for extrinsic reasons and utilize memorization or low level cognitive skills don't think they learned much and don't value the learning experience. These findings are consistent with Dewey's (1933) statement that experience in and of itself is not always educative and Bacon and Stewart's (2006) conclusion that projects can be a hit-or-miss method of learning. Thus, Hypotheses 1a and 1b are supported.

Higher scores on the Experiential Learning Stages scale indicate greater completion of all four learning stages which theoretically should result in greater learning. The .90 coefficient from Experiential Learning Stages to Deep Approaches to Learning suggests that experiences that incorporate the full aspect of the learning cycle

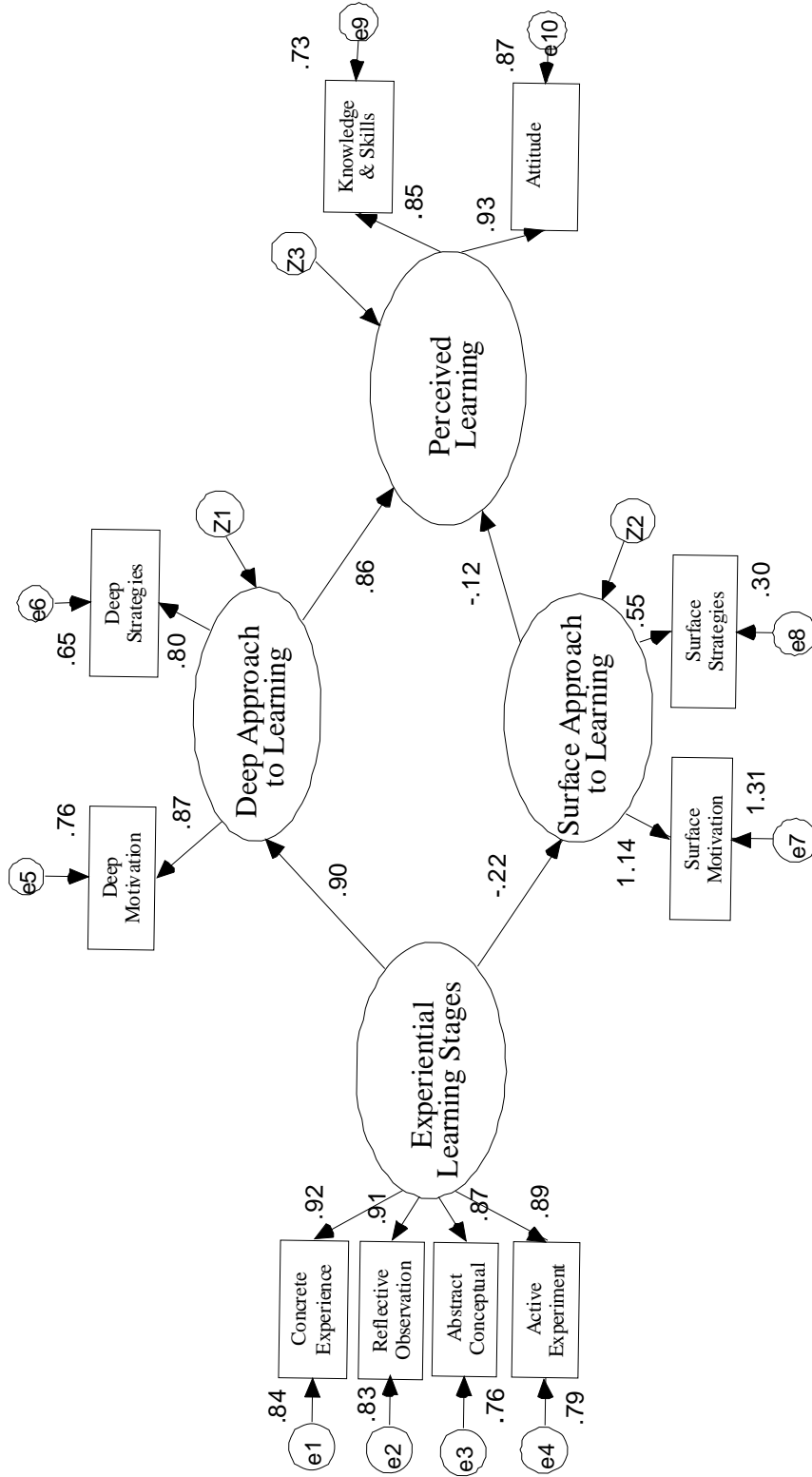
may create greater intrinsic motivation and stimulate the use of deeper cognitive learning strategies which in turn results in higher perceived learning and more favorable attitudes, supporting Hypothesis 2a. Conversely when the experience motivates the students to simply complete the task as a requirement/grade, which suggests they do just what it takes to complete the task, they recognize the lack of learning and form less favorable attitudes toward the activity. The -.22 coefficient between Experiential Learning Stages and Surface Approaches to Learning further supports Hypothesis 2b and indicates the importance of well-designed experiences to produce the intended learning outcomes.

Hypothesis 3 states that the effect of the experiential learning activity on Perceived Learning will be mediated by Students' Approaches to Learning. The significant coefficients displayed in Figure 2 and discussed previously establish two of the three conditions (Baron and Kenny 1986) for a mediated effect of the activity. The third condition necessary for establishing a mediated effect is that there is no significant direct path between Experiential Learning Stages and Perceived Learning. To test this condition, we fitted the model in Figure 2 with a direct path between Experiential Learning Stages and Perceived Learning, which resulted in an insignificant ( $p = .67$ ) direct path coefficient (-.10). These results support Hypothesis 3 and the conclusion that the experiential activity only indirectly affects Perceived Learning.

## DISCUSSION

These findings suggest that experiential learning activities should be systematically assessed to insure that the desired learning processes and outcomes are being achieved. Designing experiential activities that explicitly incorporate all four stages of the learning cycle, as well as creating experiences that are intrinsically motivating to students, seem to be the foundation for stimulating the use of deeper cognitive learning processes and meaningful learning. Particularly interesting to this discussion is that neither students' perception of learning nor their approaches to learning were significantly correlated with their standardized multiple-choice exam scores. Peng and Bettens (2002) report similar findings which may suggest that short-term objective learning outcomes may be the result of either deep cognitive learning or surface level learning. Thus, understanding the learning process may be the key to understanding why students who perform well on class outcome measures rapidly forget over time as reported by Bacon and Stewart (2006). Where as we do not have direct longitudinal data to support the above contention, we can report a one percent improvement on the Educational Testing Service's marketing exam taken by our College of Business students following the implementation of our experiential learn-

**FIGURE 2**  
**STRUCTURAL EQUATION MODEL: EXPERIENTIAL LEARNING EVALUATION**



NOTE: N = 167. Standardized solution. All coefficients significant at p = .05.

ing activities. These results support Bacon and Stewart's (2006) recommendation to "develop a pedagogy that requires deep learning early and often."

The results of this study provide empirical support for the theoretical relationships between experiential learning theory and students' approaches to learning theory. It suggests two things. First, students who perceived greater learning incorporated Kolb's learning stages in the learning process, i.e., linking an experiential activity with past experiences as well as academic content along with reflective exercises. Second, they were more intrinsically motivated and utilized deeper learning strategies, which can result not only in the perception that they learned more but they also seemed to enjoy the learning more. This conclusion is consistent with Young's (2005) findings that motivation plays a key role in stimulating deep cognitive learning strategies and self-regulated learning. These findings also provide support for the appropriateness of incorporating the experiential learning evaluation framework, in Figure 2, into classroom assessment to insure the student perspective of the learning process is represented along with faculty assessment and traditional outcome assessment.

## IMPLICATIONS AND RECOMMENDATIONS

This research evaluated experiential learning activities for the purpose of improving the learning process in the classroom. Findings from this study support Dewey's (1953) conclusion that experiential learning activities in and of themselves do not always produce meaningful learning. From the findings of our research, we recommend the following.

First, evaluate the learning process along with the learning outcomes. Relying on traditional learning outcomes such as exams, end of semester projects, etc. limits the instructor's ability to adequately assess outcomes in order to provide direction for improvement. What is unknown from this process is the meaning of the outcome: was low performance due to lack of motivation and effort or insufficient knowledge and skills, was high performance based on the use of surface learning strategies that may result in satisfactory short-term performance but actually lacks long-term meaningful learning and so on? An assessment of the learning process allows the instructor to see beyond the surface of the learning outcome and can assist in improving the learning process to produce the desired level of performance. Finally, while the evaluation framework presented in this study seems appropriate for experiential based learning activities, it can be modified for differing learning situations, such as those based on an alternative learning theory such as humanistic, cognitive, behavioral, etc.

Secondly, provide opportunities for students to engage in all four stages of the experiential learning cycle. The results from this study suggest that experiential

learning activities that incorporated all four stages of the learning cycle led to a deeper approach to learning and a reporting of a higher level of perceived learning and more favorable attitudes by students. Recall that Bacon and Stewart (2006) demonstrated that students' consumer behavior knowledge was retained longer when learned at a deeper level. To encourage deeper meaningful learning, faculty should design comprehensive learning activities that allow for concrete experiences, reflective observation, abstract conceptualization, and active experimentation. The different activities required in these stages should motivate students and allow for a variety of cognitive skills, thus encouraging them to acquire and transform the more concrete experiences, as well as abstract concepts and models, into meaningful information. Thus, it facilitates multiple learning styles but also requires that the hands-on experience is interpreted in a minds-on manner; see Young (2002) for references to examples of experiential learning pedagogies.

Third, in accordance with the above recommendations, actively seek to incorporate activities that will stimulate deeper level learning in the classroom. Open-ended assignments can be effective, particularly when using "real life" topics that require mental organization, manipulation, and integration of information. Thomas (2003) provides an example of using student postings to on-line discussion board forums as a method of creating a social context which allows students to view models of thinking and writing as well as to reflect on their own ideas and writing. She also indicates the public postings may stimulate greater student effort because the assignment is viewed by their peers. Requiring students to organize the material in this activity is facilitated by using a cycle of writing, editing and re-writing the assignments. Requiring students to reflect on lessons learned from the experience helps to relate the experience to course material and theory, and thus validates that correct knowledge is being generated. As previously stated, if learning is left to experience alone, the knowledge generated may be inaccurate as Eisenstein and Huthchson (2006) have documented with marketing managers use of "action-based" learning.

## RESEARCH LIMITATIONS AND FUTURE RESEARCH OPPORTUNITIES

The framework for evaluating experiential learning activities and the use of positivistic methods to examine it suggest limitations in the more traditional sense of sampling issues, measurement validation, and the ability to generalize the findings. Therefore, we explicitly recognized the need for replication at other institutions as well as the additional need to validate and further develop the measurement scales. Second, extending the evaluation framework to incorporate other learning theories and examine their effect on the learning process will allow for

further advancement of this area of research. Finally, exploring the effect of the learning process in a longitudinal format will enhance knowledge of creating learning activities to produce long-term meaningful learning. As

we found, the evaluation framework tested in this study suggests the necessity and importance of well-designed learning experiences to stimulate desired learning processes that produce meaningful outcomes.

---

## REFERENCES

- Ainley, M.D. (1993), "Styles of Engagement with Learning: Multidimensional Assessment of their Relationship with Strategy Use and School Achievement," *Journal of Educational Psychology*, 85, 395–405.
- Andrews, J., C. Violato, K. Rabb, and M. Hollingsworth (1994), "A Validity Study of Biggs' Three-Factor Model of Learning Approaches: A Confirmatory Factor Analysis Employing a Canadian Sample," *British Journal of Educational Psychology*, 64, 179–85.
- Amos 4.0. (1999), *Small Waters Corporation*. Chicago, Illinois.
- Atherton, J.S. (2005), "Learning and Teaching: Deep and Surface Learning," Retrieved November 3, 2006, from [http://www.learningandteaching.info/learning/deepsurf.htm].
- Bacon, D.R. and K.A. Stewart (2006), "How Fast Do Students Forget What they Learn in Consumer Behavior? A Longitudinal Study," *Journal of Marketing Education*, 28 (3), 181–92.
- Baron, R.M. and D.A. Kenny (1986), "The Moderator-Mediator Variable Distinction in Social Psychological Research: Conceptual, Strategic, and Statistical Considerations," *Journal of Personality and Social Psychology*, 51 (6), 1173–82.
- Biggs, J.B. (1987), *Student Approaches to Learning and Studying*. Camberwell, Vic., Australian Council for Educational Research.
- \_\_\_\_\_ (1999), *Teaching for Quality Learning at University*. Buckingham: Open University Press.
- \_\_\_\_\_, D. Kember, and D.Y.P. Leung (2001), "The Revised Two-factor Study Process Questionnaire: R-SPQ-SF," *British Journal of Educational Psychology*, 71, 133–49.
- Carmine, E.G. and J.P. McIver (1981), "Analyzing Models with Unobserved Variables," in *Social Measurement: Current Issues*, G.W. Bohrnstedt and E.F. Borgatta, eds. Beverly Hills: Sage.
- Das, J.P., J.A. Naglieri, and D.B. Murphy (1995), "Individual Differences in Cognitive Processes of Planning: A Personality Variable?" *Psychology Record*, 45 (3), 355–71.
- Deighan, M., S. James, and H. Spotts (2006), *MarketShare*. Charlottesville, VA: Interpretive Simulations.
- Dewey, J. (1933), *How We Think*. Boston: Heath.
- Dilts, J.C., W.J. Hauser, D. Lewison, and M. LeHere (2007), "E-Venture: Setting Up Shop Online: Creating a Student E-Business Pre-Incubator Experience," *Journal for Advancement of Marketing Education*, 11 (Winter), 1–10.
- Educational Resource Center (2006), *ERIC Thesaurus*. Retrieved November 3, 2006, from [http://www.eric.ed.gov/], EBSCO, ERIC database.
- Eisenstein, E.M. and J.W. Hutchinson (2006), "Action-Based Learning: Goals and Attention in the Acquisition of Marketing Knowledge," *Journal of Marketing Research*, 42 (May), 244–58.
- Glen, S. and J. Nelson (1988), *Raising Self-Reliant Children in a Self-Indulgent World: Seven Building Blocks for Developing Capable Young People*. Rocklin, CA: Prima Publishing and Communications.
- Hamer, L.O. (2000), "The Additive Effects of Semistructured Classroom Activities on Student Learning: An Application of Classroom-Based Experiential Learning Techniques," *Journal of Marketing Education*, 22 (1), 25–34.
- Harris-Tuck, L. (2006), *Brand You*, 4<sup>th</sup> ed. Upper Saddle River, NJ: Pearson/Prentice Hall.
- Hatcher, J.A. and R.G. Bringle (2000), "Reflection: Bridging the Gap Between Service and Learning," *College Teaching*, 45 (4), 153–58.
- Hu, L. and P.M. Bentler (1999), "Cutoff Criteria for Fit Indexes in Covariance Structural Analysis: Conventional Criteria versus New Alternations," *Structural Equation Modeling*, 6, 1–55.
- Hwang, Y.S. and V. Konstantinos (2002), "Elementary In-Service Teachers' Self-Regulated Learning Strategies Related to their Academic Achievements," *Journal of Instructional Psychology*, 29 (3), 147–54.
- Kember, D., M. Charlesworth, H. Davies, J. McKay, and V. Stott (1997), "Evaluating the Effectiveness of Educational Innovations: Using the Study Process Questionnaire to Show that Meaningful Learning Occurs," *Studies in Educational Evaluation*, 23 (2), 141–57.
- \_\_\_\_\_, \_\_\_\_\_, and D. Leung (1998), "The Dimensionality of Approaches to Learning: An Investigation with Confirmatory Factor Analysis on the Structure of SPQ and LPQ," *British Journal of Educational Psychology*, 68, 395–407.
- \_\_\_\_\_, \_\_\_\_\_, A. Jones, and A.Y. Loke (2000), "Development of a Questionnaire to measure the Level of Reflective Thinking," *Assessment and Evaluation in Higher Education*, 25, 380–95.
- Kolb, D.A. (1981), "Learning Styles and Disciplinary

- Differences,” in *The Modern American College*, A.W. Chickering and Associates, eds. San Francisco: Jossey-Bass, 232–55.
- \_\_\_\_\_ (1984), *Experiential Learning: Experience as the Source of Learning and Development*. Englewood Cliffs, NJ: Prentice-Hall.
- \_\_\_\_\_, R.E. Boyatzis, and C. Mainemelis (2000), “Experiential Learning Theory: Previous Research and New Directions, in *Perspectives on Cognitive Learning, and Thinking Styles*, R.J. Sternberg and L.F. Zhang, eds. New Jersey: Lawrence Erlbaum.
- Kumcu, E. and A. Kumcu (1998), “Undergraduate Student Consulting in Export Marketing: An Experiential Course in Electronic Resource Use,” *Marketing Education Review*, 8 (1), 59–72.
- LeCair, D.T. and B. Stottinger (1999), “Using an Intensive Living Case in Graduate Marketing Courses: Experiences from an International Project,” *Marketing Education Review*, 9 (3), 31–40.
- Linrud, J.K. and M.C. Hall (1999), “Integrating the Business Practitioner into Marketing Coursework,” *Marketing Education Review*, 9 (2), 15–22.
- Marton, F. and R. Saljo (1976), “On Qualitative Differences in Learning, Outcome and Process,” *British Journal of Educational Psychology*, 46, 4–11.
- McDermott, L.C. and P.S. Shaffer (1992), “Research as a Guide for Curriculum Development: An Example from Introductory Electricity, Part 1: Investigation of Student Understanding,” *American Journal of Physics*, 60 (11), 994–1003.
- Mitchell, A.A. and J.C. Olsen (1981), “Are Product Attribute Beliefs the Only Mediators of Advertising Affects on Brand Attitude?” *Journal of Marketing Research*, 18, 318–32.
- Owen, R.S. (1999), “Using Programmed Branching to Automate Interactive Cases on the Web,” *Marketing Education Review*, 9 (3), 41–60.
- Peng, L.L. and R.P.A. Bettens (2002), “NUS Students and Biggs’ Learning Process Questionnaire,” *The Center for Development of Teaching and Learning Brief*, (October), 3–6.
- Sachs, J., Y.K. Law, and C.K.K. Chan (2003), “A Non-Parametric Item Analysis of a Selected Item Subset of the Learning Process Questionnaire,” *British Journal of Educational Psychology*, 73, 395–423.
- Schwartz, J. and R. Fontenot (2007), “Recreating the Principles of Marketing Group Project: A Case Study in Service Learning,” *Journal for Advancement of Marketing Education*, 11 (Winter), 11–18.
- Sheckley, B.G., G.J. Allen, and M.T. Keeton (1993), “Adult Learning as Recursive Process,” *Journal of Cooperative Education*, 28, 56–67.
- Thomas, J. (2003), “Facilitation of Critical Thinking and Deep Cognitive Processing by Structured Discussion Board Activities,” Retrieved December 3, 2006 from [http://www.celt.lsu.edu/cfd/e%2Dproceedings/], *THE Forum E-Proceedings*.
- Watkins, D.A. and M.Mboya (1997), “Assessing the Learning Process in Black South African Students,” *Journal of Psychology*, 131, 632–40.
- Young, M.R. (2002), “Experiential Learning = Hands-On + Minds-On,” *Marketing Education Review*, 12 (1), 43–51.
- \_\_\_\_\_, B.R. Klemz, and J.W. Murphy (2003), “Enhancing Learning Outcomes: The Effects of Instructional Technology, Learning Styles, Instructional Methods, and Student Behavior,” *Journal of Marketing Education*, 25 (2), 91–103.
- \_\_\_\_\_ (2005), “The Motivational Effects of Classroom Environment in Facilitating Self-Regulated Learning,” *Journal of Marketing Education*, 27 (1), 25–40.

# THE COMPARISON AND TESTING OF A HYBRID-WIKI COURSE

*J. Michael Weber, Mercer University*

## ABSTRACT

*The purpose of this paper is to introduce the concept of the Wiki as a technology and educational supplement for the classroom. In addition, the study compared learning outcomes and student satisfaction between a traditional brick and mortar course, an online course, and a Hybrid-wiki course. The results indicate that the Hybrid-Wiki course provided the highest level of learning outcomes and course satisfaction among the three formats. The Wiki provides a creative and collaborative learning environment that facilitates many of the practical applications being experienced in the online marketing environment.*

## INTRODUCTION

Are we (i.e., Marketing Educators) ready for the Wiki? Are we utilizing the most collaborative tools and techniques that foster both learning and skills development? The students are actively engaged in the online environment via blogs, podcasts, webinars, Youtube, Facebook, Myspace, etc., so it seems that their educational environment should borrow from this fascinating and collaborative environment. The Wiki provides this interactive and collaborative environment. It is interesting to think that our students are engaging in a new type of writing that can be considered online writing, which entails designing web sites, writing weblogs, and creating and managing Wikis. New writers are redefining writing online, creating new forms and approaches for new audiences.

The Wiki can be described as a combination of a Web site and a Word document. At its simplest, it can be read just like any other web site, with no access privileges necessary (access restrictions are recommended for educational endeavors), but its real power lies in the fact that groups can collaboratively work on the content of the site using nothing but a standard web browser. Beyond this ease of editing, the second powerful element of a Wiki is its ability to keep track of the history of a document as it is revised. Since users come to one place to edit, the need to keep track of Word files and compile edits is eliminated. Each time a person makes changes to a Wiki page, that revision of the content becomes the current version, and an older version is stored. Versions of the document can be compared side-by-side, and edits can be rolled back if necessary. The Wiki is gaining traction in education, as an ideal tool for the increasing amount of collaborative work done by both students and teachers. Students might use a Wiki to collaborate on a group report, compile data or share the results of their research, even help to create their test, while faculty might use the Wiki to collaboratively author the structure and curriculum of a course.

(For current and more detailed information on Wikis, please refer to the following web sites: [<http://en.wikiversity.org>] or [<http://www.ibm.com/developerworks/wikis/display/WEinstructors/Courses>]).

Over the last 15 years there has been a proliferation of courses and programs that have been available over the World Wide Web. This includes both distance education and resident student instruction. There are a variety of technology platforms that have been utilized, such as Blackboard, WebCT, Web 2.0, and Sharepoint, among others, and the integration of new technology tools such as blogs (Levin and Davis 2007). There has also been a variety of discussions regarding the effectiveness of the various tools versus traditional brick and mortar delivery methods (Peltier et al. 2007).

Traditional bricks and mortar courses have a long history of proving how effective they are through exams, student evaluations, and student feedback. Yet, there has been a lingering debate in the literature and halls of academia as to whether online courses are as effective as traditional courses (Hansen 2008; Chen and Jones 2007; Hiltz 1993). This study actually initiates a precursory investigation into comparing the effectiveness of three different types of courses. The first type of course is a Wiki-based course, while the second course is a traditional brick and mortar courses and the third course is a Web-based course. In other words, the Wiki course is positioned as a "hybrid" alternative to the traditional course and the web-based course. More specifically, this study investigates if there are differences in learning across the three course formats and whether there were any differences in student satisfaction.

## LITERATURE REVIEW

When looking at the effectiveness of Web-based and bricks and mortar formats researchers have found very different outcomes (Vat 2006). Weber and Lennon (2007) found that learning outcomes were virtually the same between traditional brick and mortar classes and web-

based courses. Vogt, Atwong, and Fuller (2005) found that students in an advanced business communication course did achieve a high level of proficiency and they did so equally in both traditional and online classes. Bata-Jones and Avery (2004) in research on nursing students who took a pharmacology course found that there were no significant differences between the mean exam scores of students in enrolled in the web-based and traditional courses. In 2004, Kearns, Shoaf, and Summey found that students in a Web-based second-degree bachelor of science (in Nursing) program scored significantly higher on the final examination and the comprehensive examination than did students in the traditional course. Buckley (2003) found that students in a web-based nutrition course received a lower mean course evaluation score than students in a traditional similar course. In 2002, Maki and Maki found that students in a Web-based course (psychology) learned more than students in a bricks and mortar section of the same course. Arbaugh and Duray (2002) compared two web-based MBA programs, one with some on-site meetings and the other totally online. They found that larger class sizes were negatively associated with perceived learning. Sankaran, Sankaran, and Bui (2000) researched the amount learned in Web-based and bricks and mortar versions of an undergraduate business computer course. No significant difference in learning gain from pretest to the final exam was found. Wang and Newlin (2000) compared Web-based and bricks and mortar sections of a statistics course. They found that the bricks and mortar students scored higher on the final exam than did the Web-based students. Hiltz (1993) compared Web-based and bricks and mortar sections of several courses and found equal learning in the Web-based and bricks and mortar section in almost all courses and superior learning in the Web-based computer science course.

When looking at level of student satisfaction in Web-based courses versus bricks and mortar courses results also varied in the studies we found. Chen and Jones (2007), Stanley (2006) and Arbaugh (2005) all find that satisfaction was similar to traditional course delivery systems. In contrast to these results, Weber and Lennon (2007) found that student satisfaction was lower for web-based classes because there was a disconnect with the professor and a lack of meaningful collaboration with their fellow students. Additionally, Kearns, Shoef, and Summey (2004) found less satisfaction for students in a Web-based second-degree bachelor of science (in Nursing) program than the traditional course method. Bata-Jones and Avery (2004) in research on nursing students who took a pharmacology course found that students enrolled in the web-based course were more positive about their experience than those enrolled in the traditional course. In 2003, Buckley in her study on students in nutrition classes had much more neutral findings, where the students expressed both positive and negative

aspects of the online instruction. In 2002, Wills found that students seemed to favor an online format for the teaching of graduate level nursing courses versus the traditional classroom environment. Maki et al. (2000) found lower satisfaction in the Web-based than in the bricks and mortar version of introductory psychology, a finding replicated by Maki and Maki (2002). Arbaugh and Duray (2002) in their investigation of Web-based MBA programs found that more experienced on-line students tended to be more satisfied with Web-based delivery mechanisms. They also found that smaller class sizes were positively associated with satisfaction. Wang and Newlin (2000) found fairly equivalent satisfaction. Hiltz (1993) found that satisfaction was high in the Web-based courses (but did not compare Web-based vs. bricks and mortar).

While there has been a dutiful amount of research assessing the degree of effectiveness and satisfaction with brick and mortar vs. web-based delivery formats, there appears to be no real consensus as to whether one is better than the other. That is a fair conclusion in of itself suggesting that both formats may be appropriate for differing topics, differing audiences, and differing faculty. The evidence also seems to suggest that relatively little if any research has been done which compares a third type of delivery format, the "hybrid," which incorporates traditional brick and mortar lectures/discussions, with online technologies such as Wiki. That is the focus of the study and the premise of the methodology.

## METHODOLOGY

### Design

For the comparison process, a study was conducted that measured learning outcomes and student satisfaction across three different learning platforms. The same course (MBA level Principles/Foundations of Marketing) was delivered during three different eight-week sessions. The course was first delivered as a web-based course (lectures, discussions, evaluations were delivered in modular format via Blackboard) during the Summer term of 2007. Then the course was delivered as a traditional brick and mortar delivery (1<sup>st</sup> eight-week session of Fall 2007) with very little web-based ancillaries (the course notes, syllabus, and exam reviews were posted to Blackboard). The third version of the course was delivered (1<sup>st</sup> eight-week session of Spring 2008) as a hybrid model which incorporated traditional in-class lectures, online content and the committed use of the Wiki platform. The goal of the study was to assess whether there was a difference in effectiveness and satisfaction between the three delivery formats. Effectiveness was measured via the following:

1. Learning Achievements
  - a. Final Exam
  - b. Semester Project
  - c. Final Grade in Course

While satisfaction was measured as:

2. Overall Course Satisfaction
  - a. With Course
  - b. With Instructor

The course that was delivered as a web-based section during the Summer term was advertised as such, and therefore introduces some self-selection bias in the results. In regards to the other two sections, there were no special announcements that one section would have an alternative technology or delivery format.

As noted before, the web-based section was conducted via the Internet, which meant that all course lectures and materials were delivered via web-pages (Blackboard was the delivery format). This used a modular format which presented information and incorporated learning activities on a weekly basis that was relevant and comparable to information being presented in the lecture-based section (Su 2005). The traditional section of the course was conducted in a traditional "brick and mortar" environment with moderate utilization of technology such as, PowerPoint presentations, TV/VCRs, overhead projectors, notes posted on Blackboard, etc. It was essentially a lecture-based format in a classroom setting that met once a week for four hours. Finally, the "hybrid" course was delivered as a combination of traditional lectures/discussions, with technology support via Blackboard, and most importantly the inclusion of Wiki capabilities. Wiki (via SocialText Inc.) provided the students with the opportunity to: (1) easily create simple, collaborative websites; (2) develop projects with peer review; (3) group author projects; (4) track a group project; (5) coordinate data collection; (6) develop collaborative presentations; and (7) contribute to course content and even help in the development of their own exams.

### Demographic Variables

At the beginning of each term, the demographic variables were measured across each section. The demographic variables are as follows:

GPA: Student grade point averages were taken from official University records.

Academic Level: Student academic level was taken from official class rosters. The students were categorized as 1<sup>st</sup> year, 2<sup>nd</sup> year or imminent graduation.

Web-Based Experiences in classroom settings: Information was taken from pretests, indicating student self-reported experience with prior web-based classroom settings.

Perceived Knowledge: Information was taken from pretests, indicating student self-reported prior perceived knowledge with the Internet.

Course Format: This is not a measured variable, but it may influence the dependent variables.

The variables were measured utilizing standard dichotomous questions and a series of likert-scale ques-

tions. For instance, experience questions were literally based on a series of yes/no questions that assessed whether they had participated in a particular online activity. The perceived knowledge questions were based on a series of questions that utilized a 5-point likert-scale, which assessed the degree to which the respondent believed they had knowledge of the specific issue.

### Outcome Variables

At the end of each term, the dependent variables were measured, based on the following variable descriptions:

Learning Achievement: This information was taken from the various assignments that students submitted for the courses, such as the final exam, the semester project and the overall final grade.

Course Satisfaction: Information was taken from the student evaluations of the course at the end of the term.

The measurement procedure for learning achievement was fairly straightforward as it was based on actual scores that were achieved by the students. While course satisfaction was measured utilizing a series of questions with likert-type scales ranging from "strongly agree" to "strongly disagree." These questions are illustrated in Table 2.

### DATA ANALYSIS

The demographic variables are described in detail in Table 1.

As illustrated in Table 1, the demographic variables have insignificant differences between the groups. This is important for establishing predictive validity as we examine the outcome variables. Multivariate normality was examined by both a graphical examination of the data distribution and statistical test for the remaining items. Histograms of the data distributions of the relative influence variables did not exhibit departures from normality. In addition, the skewness and kurtosis statistics of each of these variables were within an acceptable range (less than  $\pm 1.96$ , which corresponds to a .05 error level). Finally, the Shapiro-Wilke's test further confirmed that there were no departures from normality, and that the distributional characteristics of the data would not influence the results. In terms of GPA's, we found that there was no significant difference in GPA's between the three sections. Therefore, we assumed that each section started with similar academic backgrounds and potential for learning. The only variable with a notable difference was group size, because the online group was smaller than the traditional class.

### RESULTS AND DISCUSSION

The following results compare the three delivery formats utilizing the pre-test and post-tests. The implica-

**TABLE 1  
DEMOGRAPHIC VARIABLES**

Variables		Online	Trad.	Hybrid	Sig-Diff
Enrollment		29	35	34	N/A
Average GPA		3.72	3.75	3.68	Insig.
Gender:	Male	19	15	13	N/A
	Female	10	20	21	N/A
Academic Level	1 <sup>st</sup> Year	15	21	17	N/A
	2 <sup>nd</sup> Year	9	10	14	N/A
Web-based Experiences	Imminent Graduation	5	4	3	N/A
	Perceived Knowledge of Web-Based Courses	2.90	3.07	2.96	Insig.
	Experience in Online Course	1.98	1.93	1.94	Insig.
	Experience with Online Course Components	1.89	2.00	1.98	Insig.

tions of each question are discussed. The statistical procedures utilized involved frequency analysis, means analysis, and a *t*-test to assess significant differences between means.

### Learning Achievement

In terms of learning achievement, we assessed results on the final exam, results on the semester project, and overall results in the course. In terms of course performance, we found that the final course grade was significantly higher for the hybrid section compared to the traditional and the online course. In addition, the hybrid section scored significantly better on the final exam than the traditional section, and scored significantly higher on the final project than the online section. This is an indication that the students in the hybrid section performed at a higher level than the students in the traditional section or the online section.

### Course Satisfaction

In order to measure general course satisfaction, there were eight questions which are evaluations of the course and instructor, which utilize a 5-point likert type scale ranging from “strongly agree” to “strongly disagree.” The actual questions are illustrated in Table 2. The general results indicate that there are a variety of differences between the sections. In general, it can be stated that the students were satisfied with all measurable components of satisfaction across all three sections, but the study was seeking to determine if there were significant differences in those perceptions.

The results indicate that hybrid section performed better than both the traditional and the online sections in terms of their self-perception of learning and the overall collaborative environment. The online section was significantly lower on the perception that the classroom environment encourages learning. The online section was also lower in overall course satisfaction, while the hybrid section had the highest level of overall course satisfaction.

These results are interesting because it certainly suggests that technology integration into the classroom provides comparable and even higher outcomes than traditional delivery systems. It also suggests that the hybrid – Wiki course may provide the ideal learning scenario for today’s wired student. They get the personalized interaction with the professor during the live lectures and discussion, and they get to develop online writing and creativity skills through collaborative efforts with their class mates and professor.

### CONCLUSIONS

Overall, the outcomes of this study lend strong support for the development and utilization of online technologies in the delivery of course materials. The following items represent the top five outcomes that we found while conducting this research:

1. Similar course objectives and goals are achieved in all three environments.
2. The same degree of learning outcomes was achieved in all three environments.
3. Course satisfaction was significantly higher for the Hybrid-Wiki section.

**TABLE 2  
OUTCOME VARIABLES**

Variables	Questions	Trad.	Online	Hybrid	Sig. Dif. 1*	Sig. Dif. 2**	Sig. Dif. 3***
<b>Learning</b>	Final Exam	84%	85%	88%	Insig.	.046	Insig.
<b>Achievement</b>	Final Project	88%	87%	91%	Insig.	Insig.	.045
	Final Grade GPA	3.52	3.51	3.75	Insig.	.034	.034
<b>Satisfaction</b>	Q1: Excellent Teacher	1.13	1.18	1.14	Insig.	Insig.	Insig.
	Q2: Overall, I learned a great deal in this course.	1.22	1.25	1.17	Insig.	.041	.038
	Q3: The course created a collaborative learning environment	1.25	1.20	1.09	Insig.	.026	.033
	Q4: The instructor keeps students interested and motivated.	1.22	1.25	1.20	Insig.	Insig.	Insig.
	Q5: The instructor creates a classroom environment that encourages students to learn.	1.17	1.25	1.15	.041	Insig.	.037
	Q6: The instructor presents course materials in a clear and organized manner.	1.09	1.12	1.12	Insig.	Insig.	Insig.
	Q7: The instructor utilizes time effectively and appropriately.	1.22	1.25	1.24	Insig.	Insig.	Insig.
	Q8: Overall, I am very satisfied with this course.	1.17	1.25	1.09	.041	.028	.021

\* **Sig. Dif. 1 = Trad. vs. Online**  
 \*\* **Sig. Dif. 2 = Trad. vs. Hybrid**  
 \*\*\* **Sig. Dif. 3 = Online vs. Hybrid**

4. Students are comfortable with the technology and delivery environment.
5. The Hybrid-Wiki provides both personal interaction with the professor and collaboration opportunities with peers, which generates higher performance and satisfaction outcomes.

It appears that the use of online technologies can be very beneficial for the university community, and that it has many benefits in the learning environment. Essentially, online technology makes education available at any time and any place. This precursory research indicates that online technologies provide comprehensive and comparable learning environments.

### Implications

The technology and potential for the integration of technology into courses changes rapidly, therefore it is imperative to conduct ongoing research. A continuous longitudinal research approach would help to facilitate the continued development and refinement of technology integration and online courses to ensure that various benchmarks are being achieved. In terms of benchmarks, it would be in the best interest of a university to establish

a series of benchmarks, evaluation guidelines, online course strategy, etc., as we can expect the integration of technology in the education community to continue to grow.

Wikis might be the easiest and most effective Web-based collaboration tool in any instructional portfolio. Their inherent simplicity provides students with direct (and immediate) access to a site's content, which is crucial in group editing or other collaborative project activities. A Wiki's versioning capability can show the evolution of thought processes as students interact with the site and its contents. These collaborative projects help promote ownership in the team's activities. In addition, Wikis are being used as e-portfolios, illustrating their utility as a tool for collection and reflection. Collaboration using a Wiki is not limited to students. Faculty can use Wikis to collaborate on projects, whether editing a textbook, preparing a journal article, or assembling a syllabus or reading list. Wikis might also prove to be an ideal vehicle for soliciting ongoing input for research or projects where community input can help inform and direct subsequent investigation. The possibilities for using Wikis as the platform for collaborative projects are limited only by one's imagination and time. Wiki-en-

abled projects can provide various levels of site access and control to team members, offering a fine-tuning element that enhances the teaching and learning experience. It appears that the Wiki can be an effective tool, and

it provides a collaborative environment that mirrors many of the non-academic environments that our students readily participate in.

---

## REFERENCES

- Arbaugh, J.B. and R. Duray (2002), "Technological and Structural Characteristics, Student Learning and Satisfaction with Web-Based Courses: An Exploratory Study of Two On-Line MBA Programs," *Management Learning*, 33 (3), 331-47.
- \_\_\_\_\_ (2005), "Is There an Optimal Design for Online MBA Courses?" *Academy of Management Learning & Education*, 4 (2), 135-43.
- Bata-Jones, B. and M. Avery (2004), "Teaching Pharmacology to Graduate Nursing Students: Evaluation and Comparison of Web-Based and Face-to-Face Methods," *Journal of Nursing Education*, 43 (4), 185-89.
- Buckley, K.M. (2003), "Evaluation of Classroom-Based, Web-Enhanced, and Web-Based Distance Learning Nutrition Courses for Undergraduate Nursing," *Journal of Nursing Education*, 42 (8), 367-70.
- Chen, C.C. and K.T. Jones (2007), "Blended Learning vs. Traditional Classroom Settings: Assessing Effectiveness and Student Perceptions in an MBA Accounting Course," *The Journal of Educators Online*, 4 (1), 1-15.
- Hansen, D.E. (2008), "Knowledge Transfer in Online Learning Environments," *Journal of Marketing Education*, 30 (2), 93-101.
- Hiltz, S.R. (1993), "Correlates of Learning in a Virtual Classroom," *International Journal of Man-Machine Studies*, 39, 71-98.
- Kaynama, S.A. and G. Keesling (2000), "Development of a Web-Based Internet Marketing Course," *Journal of Marketing Education*, 22 (2), 84-89.
- Kearns, L.E., J.R. Shoaf, and M. Summey (2004), "Performance and Satisfaction of Second-Degree BSN Students in Web-Based and Traditional Course Delivery Environments," *Journal of Nursing Education*, 43 (6), 280-84.
- Levin, M.A. and D.F. Davis (2007), "Virtual Third Places and Experiential Learning: A Case Study of Blogging in a Marketing Promotions Course," *Journal for Advancement of Marketing Education*, 10 (1), 18-26.
- Maki, W.S., R.H. Maki, M. Patterson, and P.D. Whittaker (2000), "Evaluation of a Web-Based Introductory Psychology Course: 1. Learning and Satisfaction in Web-Based Versus Lecture Courses," *Behavior Research Methods, Instruments & Computers*, 32, 230-39.
- \_\_\_\_\_ and \_\_\_\_\_ (2002), "Multimedia Comprehension Skill Predicts Differential Outcomes of Web-Based and Lecture Courses," *Journal of Experimental Psychology: Applied*, 8, 85-98.
- Martins, L.L. and F.W. Kerrmanns (2004), "A Model of Business School Students' Acceptance of a Web-Based Course Management System," *The Academy of Management Learning and Education*, 3 (1), 7-26.
- Peltier, J.W., J.A. Schibrowski, and W. Drago (2007), "The Interdependence of the Factors Influencing the Perceived Quality of the Online Learning Experience: A Causal Model," *Journal of Marketing Education*, 29 (2), 140-53.
- Sankaran, S.R., D. Sankaran, and T.X. Bui (2000), "Effect of Student Attitude to Course Format on Learning Performance: An Empirical Study in Web vs. Lecture Instruction," *Journal of Instructional Technology*, 27, 66-73.
- Siu, W-S. and L.F. Chau (1998), "Teaching Marketing Research on the Internet," *Journal of Education for Business*, 74 (1), 44-49.
- Stanley, O.L. (2006), "A Comparison of Learning Outcomes by 'In-Course' Evaluation Techniques for an On-Line Course in a Controlled Environment," *The Journal of Educators Online*, 3 (2), 1-15.
- Su, B. (2005), "Examining Instructional Design and Development of a Web-Based Course: A Case Study," *International Journal of Distance Education Technologies*, 3 (4), 62-77.
- Vat, K.H. (2006), "Developing a Learning Organization Model for Problem-Based Learning: The Emergent Lesson of Education from the IT Trenches," *Journal of Cases on Information Technology*, 8 (2), 82-110.
- Vogt, G. (2005), "Student Assessment of Learning Gains (SALGains)," *Business Communication Quarterly*, 68 (1), 36-43.
- Wang, A.Y. and M.H. Newlin (2000), "Characteristics of Students Who Enroll and Succeed in Psychology Web-Based Classes," *Journal of Educational Psychology*, 92, 137-43.
- Weber, J.M. and R. Lennon (2007), "Multi-Course Comparison of Traditional Versus Web-Based Course Delivery Systems," *Journal of Education Online*, 4 (2), 1-19.
- Wills, C. and M. Stommel (2002), "Graduate Nursing Students' Precourse and Postcourse Perceptions and Preferences Concerning Completely Web-Based Courses," *Journal of Nursing Education*, 41 (5), 193-201.

# PREPARING THE NEXT GENERATION OF SALES PROFESSIONALS THROUGH SOCIAL, EXPERIENTIAL, AND IMMERSIVE LEARNING EXPERIENCES

*Scott A. Inks, Ball State University*  
*Ramon A. Avila, Ball State University*

## ABSTRACT

*Research indicates active learning strategies are more effective than traditional passive learning strategies, especially when it comes to behavioral skill development. This paper presents a series of active learning assignments that incorporate a mixture of simulated and real-world learning experiences. These experiences are designed not only to enhance students' understanding of sales and improve their selling skills, but also to begin socializing students to the world of the sales professional.*

## INTRODUCTION

Business education continues to evolve as schools explore and develop new major content areas (e.g., entrepreneurship and professional selling) and new course delivery methods (e.g., web-based courses). A constant across emerging content and delivery methods is the concern for the quality and effectiveness of the learning experience. Active learning continues to be recognized as one of the most effective learning strategies available, yet it is often difficult to implement. While the advent of PowerPoint has improved the visual elements of the more traditional lecture formats, college students continue to lament classroom experiences dominated by non-interactive lecture.

The literature base is full of articles detailing the value of engaging students through active learning strategies, which for purposes of this paper include those based on social learning theory, experiential learning, and immersive learning. What has received little attention in the business school literature is the extent to which sales coursework helps socialize students to the business world in general and the role of a salesperson in particular. In other words, how well does the coursework and classroom experience help students better identify with their future roles as sales professionals, including the type of work they will be doing, the expectations for which they will be accountable, the typical day-to-day activities in which they will be engaging, and the language of the sales professional?

The purpose of this paper is to present a series of exercises that not only incorporate an active learning strategy, but are also designed to begin socializing students to the professional world. These active learning experiences are utilized in an advanced professional

selling course and represent a mix of real-world and simulated experiences that challenge students to apply what they have or are learning and to begin thinking and acting like a sales professional. In addition to learning content, through these experiences students begin to understand and identify with what their professional lives may be like once they graduate and begin their careers.

## BACKGROUND

Active learning suggests people learn better when they are fully engaged in the learning process. In contrast to learning via lecture only, active learning requires students to participate in the processes through discussion, reflective thinking, problem-solving, and/or other activity requiring the learner to cognitively process the new information presented.

The advantages of experiential or activity-based learning over traditional lectures have been recognized clearly. Experiential or active learning is not only more enjoyable but also more memorable for students (Karns 2005). Compared with other passive learning modes, experiential learning encourages social learning, which then promotes greater involvement and interest in the course content. These effects have been well documented (Sautter 2007; Young 2005; Frontezak 1998; Bridges 1999; Graeff 1998; Hamer 2000; Gremler et al. 2000). The increased motivation generated by class involvement (Young 2005; Bobbitt et al. 2000) also encourages critical thinking (Sautter 2007; Klebba and Hamilton 2007; Roy and Macchiette 2005), greater retention of information, and increased confidence with class material among the involved students.

Auster and Wylie (2006) developed what they referred to as a systematic approach to active learning. This systematic approach includes four interrelated dimensions of the teaching process: context setting, class preparation, class delivery, and continuous improvement. *Context setting* refers to “establishing a receptive, candid atmosphere for learning that facilitates student interaction and engagement” (Auster and Wylie 2006, p. 336). *Class preparation* refers to planning not only the content, but also the process by which the learning will take place. *Class delivery* refers to the actual implementation of the learning strategy during a classroom session. And *continuous improvement* refers to the process of monitoring the relative success of the learning strategy and then making improvements as needed and on a regular basis. Although not yet empirically tested, the systematic approach to active learning described by Auster and Wylie (2006) appears to be a valid and useful tool for implementing active learning experiences.

### **Social, Experiential, Immersive Learning**

One form of active learning is learning based on social learning theory. Social learning theory suggests people learn by observing others, attempting to reproduce the behaviors they observe, and then modifying the behaviors based on feedback (positive or negative) from others. Learners’ confidence and motivation to successfully engage in the behaviors along with their understanding of the associated consequences/benefits impact the effectiveness of the social learning experience.

Closely related to social learning theory is experiential learning theory (ELT). Kolb (1984) created a model describing the components of experiential learning. These components include Concrete Experience, Reflective Observation, Abstract Conceptualization, and Active Experimentation. Essentially, the model details a learning process that includes actual experience, reflection on the experience, the integration of relevant theory, information and the reflections from the experience into new ideas, followed by the application of those ideas to new experiences. These new experiences may then serve to initiate the learning process again, promoting additional reflection, abstract conceptualization, and active experimentation. Frontczak (1998) suggested marketing educators should develop experiential exercises based on Kolb’s model, indicating that learning experiences lacking one or more of the four components are less effective (Kolb and Kolb 2005).

Immersive learning is a specialized form of experiential learning in which the student is immersed in an environment that generates the experiences. Johnson and Levine (2008) describe immersive learning experiences derived from students’ experiences in virtual worlds (e.g., *Second Life*). Once immersed, students become part of the virtual world, interacting with the environment

and learning from experiences that are created by design and/or experiences arising randomly from the interaction itself. One advantage of these virtual world immersive learning experiences is that students are allowed to interact with elements (including other people, activities, and so forth) and create and/or participate in experiences that may otherwise not be possible (e.g., due to expense or risk).

For purposes of this paper, we refer to immersive learning as student-driven (faculty guided) learning experiences requiring students to work (in teams) with community partners (business organizations, institutions, etc.) on real-world issues/challenges, producing a tangible outcome or product (e.g., book, DVD, business literature, etc.) addressing those issues/challenges. Students engaged in these immersive learning experiences work directly with community partner, codetermining (with the partner) the specifics of the tasks to be completed and the tangible outcomes to be produced. The students then work with the community partner over a period of weeks or months to complete the designated tasks. While similar to internships, immersive learning experiences differ in two critical ways. First, the instructor is involved throughout, driving students to engage in the reflective observation and abstract conceptualization steps of Kolb’s model of experiential learning. Without an instructor actively guiding the students, these steps may be skipped. Second, immersive learning experiences are team-based. This provides students the opportunity to share and learn with and from each other. Immersive learning experiences are more complex than other, more traditional forms of experiential learning exercises, and as a result, are less common.

### **Active Learning and Socialization**

Many schools offering one or more sales or sales management courses include some sort of sales call role-play (Sojka and Fish 2008). In the sales courses, the role plays typically involve the student (role playing as the salesperson) attempting to sell a product to someone (student or instructor) role playing as the buyer. A relative few number of articles have been written on the educational value of sales related role-plays. Those that have been written focus on how to create sales role-plays and/or their educational value (Widmier, Loe, and Selden 2007; McBane and Knowles 1994; Moncrief and Shipp 1994; Tanner and Chonko 1992; Castleberry 1989). The consensus among the published articles is that sales call role-plays represent a form of active (experiential) learning exercise that effectively helps students learn the skills necessary for success in sales careers. Yet, sales call role-plays are, by definition, simulated. In that sense, they are limited with respect to the extent to which they help students identify with the role of a salesperson. Though they may learn the skills, they don’t do so in the context

of a “real-world” setting. Exercises involving exposure to “the real world,” such as shadowing a salesperson for a day, provide students insight (via vicarious learning) into the role of a salesperson and should help socialize students to those roles. However, because the learning experience is vicarious, students don’t get the opportunity to engage in the behaviors (as they do with role-plays).

The lack of accurate socialization, or rather “anticipatory socialization may lead “entry-shock” (Paulson and Baker 1999). Entry-shock describes the feelings arising as a result of the mismatch between what the new employee expected and what he/she actually experiences with respect to socialization (Paulson and Baker 1999). While entry-shock may not adversely affect all new hires, previous research suggests a link between accurate anticipatory socialization and outcomes such as job satisfaction, commitment (Dubinsky et al. 1986), and indirectly to turnover (e.g., Ingram and Lee 1991). Paulson and Baker (1999) address the issue of socializing students to the professional setting in which they will find themselves after graduation. They found that by implementing course exercises designed begin socializing students to the business world (i.e., anticipatory socialization), students were less likely to experience entry-shock. While the Paulson and Baker (1999) work centered on general business socialization, their results suggest anticipatory socialization to professional selling careers via learning experiences while in school may reduce entry-shock for college graduates starting their careers in sales.

The learning experiences described in this paper were created for Advanced Professional Selling course. They were developed to reflect the learning processes described above but in a way that provides the socializing aspects of the vicarious learning experiences with the behavioral and skill building benefits of the role-playing (active learning) experiences. Exercises (described below) include behavioral modeling and reproduction in simulated and real-world settings, reflective thinking, and problem solving (individually and in teams), and student-directed real-world projects.

### **THE SOCIAL, EXPERIENTIAL, AND IMMERSIVE LEARNING EXPERIENCES**

Enrollment in the Advanced Professional Selling course is by permission only. To “apply” for the enrollment, students must write a letter to the instructor describing why they feel they should be allowed to register for the course. For each student applying, the instructor reviews the application letter and seeks a recommendation from that student’s Professional Selling course (prerequisite) instructor. Finally, the student applying for a spot in the class must complete an interview with the instructor. During the interview, the instructor and the student discuss the nature of the course, the types of

learning experiences, and the corresponding expectations.

To create the correct course context setting, as described by Auster and Wylie (2006), at the beginning of the semester the instructor reviews with the students the nature of the coursework, the learning experiences, the expectations, and the benefits associated with successfully completing the assignments and course. Consistent with Kolb (1984) and Kolb and Kolb (2005), students are encouraged to share their feelings about the learning experiences and to help shape their learning experiences by determining how they will execute the assignments. During the discussion the instructor advises students to pursue, where possible, inclusion of organizations or industries in which they have a professional interest in order to enhance their levels of engagement in the exercises.

Below are descriptions of five active learning experiences, including an overview, directions, examples, and benefits. These learning experiences were created for a 15-week (one semester) advanced selling course. Table 1 (below) contains a summary of these learning experiences.

### **IMMERSIVE LEARNING PROJECT (IMMERSIVE LEARNING EXPERIENCE)**

#### **Overview**

The purpose of this immersive learning project is to help students apply what they are learning in a real-world setting where accountability for the results extends beyond the classroom. In addition, the project is designed to get students working outside their comfort zones, producing an end-product that is not only useful to the participating organization, but beyond students’ perceptions of their own capabilities at the start of the project.

#### **Directions**

A critical component of the immersive learning experience is that it is student directed. Accordingly, project instructions are somewhat limited. Teams are told only that they must work with a cooperating business organization to determine a sales-related issue/challenge to be addressed via a sales-related (e.g., training, promotional) multimedia tool.

Students form teams of three to five members. The teams must identify the organization with which they would like to work and the appropriate person within the organization to contact. They must then communicate with the contact person (client) and secure that person’s agreement to participate in the project. The student teams must then meet with their respective clients, explain the nature of the project, and then co-determine (with the client) the objectives of the project and the desired outcome. For example, some clients are interested in

sales training tools while others are interested in presentations they can use in tradeshows or place on their websites.

Once the desired outcome is determined, the teams work with the client to collect relevant content (e.g., text, video, audio) and determine and add any content they feel is appropriate. Next, the teams develop the presentation strategy for the content and begin putting the pieces together to create the final product. The team must then make the final product available to the client to be used at the client's discretion. Finally, each team is required to submit for evaluation the training tool and a short paper detailing the team's experience.

### **Examples**

After interviewing the contact a team learns that the client organization's salespeople are having trouble developing a high degree of trust with their customers. Further, they learn that trust is important to the client's customers and plays a critical role in the purchase decision process. That team would then develop a self-running multimedia presentation that describes the components of trust and steps the salespeople may take to develop greater trust with their customers. The team would then make the project available to the cooperating organization and submit the project and paper for evaluation.

A participating company is looking to create sales-oriented video for a new product that it can run on a monitor during tradeshows. The team works with the client to determine the message and collect the necessary content. The team, using the provided content, creates a movie and delivers it to the client in an appropriate format (e.g., QuickTime, Windows Media File) for showing during tradeshows and other events.

### **Benefits**

This project challenges students in many ways. First, the process of finding a cooperating organization requires greater effort and attention than students initially perceive (while we provide the teams a list of prospective organizations, we do not contact any organization on behalf of the teams). Students spend time working out, sometimes through trial and error, how they need to go about getting an organization to participate in the project. This helps students with their communication and selling skills, while at the same time giving them a dose of real-world experience.

Second, indentifying an appropriate sales-related issue challenges students' time management, interviewing and reasoning skills as they must coordinate meetings with individuals who work in the "real world" and whose schedules aren't always as flexible or accommodating as students' schedules. Further, they must be able to identify

a topic that is within the scope of their sales knowledge. This can be an eye-opening experience as it reminds students that selling is truly a complex process requiring a variety of skills.

Third, teams must figure out for themselves how to create the self-running multimedia training tool. This process includes not only creating the content and how it will be organized, but to employ the appropriate technology to create the end-product. When initiated by the teams, we will consult with the students on the content and how to organize it. We will also provide suggestions for campus resources that will help the teams with the technology needed to create the presentations. Typically, students solicit help from people (students or staff) who have expertise in multimedia development. This experience serves to enhance students' ability to work in cross-functional teams.

## **COORDINATING A GUEST SPEAKER (EXPERIENTIAL LEARNING EXPERIENCE)**

### **Overview**

This assignment gives students the opportunity to coordinate a presentation by a guest speaker, including contacting the guest speaker, providing directions, arranging parking, arranging meeting space, coordinating and setting-up any needed audio-video equipment, and providing refreshments (when appropriate). The purpose of this assignment is to develop students' communication, time management, and organizational skills.

### **Directions**

Working in teams of two, students contact their assigned guest-speaker to coordinate that speaker's visit on campus. Based on feedback from the guest speaker, students must work with university personnel to reserve appropriate meeting space and any needed a/v or computer equipment. The teams must ensure the speaker has directions to the campus and the meeting location, has the necessary parking instructions and passes, and is greeted properly upon arrival to campus. Students are provided a small budget they may use to pay for refreshments or anything else needed for the speaker's visit and presentation. Students are evaluated on the relative success of the event and feedback from the guest speaker.

### **Benefits**

Because this is not a simulated experience, students gain the sort of real-world experience they may accrue sometime early in their professional careers. Because they are accountable for the relative success of the event, they can begin to identify with (socialization) the role of a salesperson or other business person tasked with coor-

dinating a meeting. Perhaps the biggest lesson students learn from this experience is that even relatively small tasks requiring coordination among multiple individuals require planning, communication, and execution. Common “first-time” mistakes included failure to acquire parking passes, failure to acquire the correct a/v equipment, failure to test the a/v equipment in the meeting room, and so forth. One team arranged for the speaker to arrive at a designated place and time but failed to arrange for anyone from the team to meet the guest and escort him to the meeting room.

This exercise requires the instructor to pay close attention to the progress of the student teams (planning and execution) while allowing them to make mistakes along the way. This can be challenging given that the mistakes usually adversely impact the experience of the guest speaker. To minimize the impact of those mistakes, guest speakers were alerted (unbeknown to the students) to the assignment ahead of time and asked to provide feedback on their experience with the student teams.

### **MANAGER/COACH (EXPERIENTIAL LEARNING EXPERIENCE)**

#### **Overview**

Advanced Professional Selling (APS) students are required to serve as Managers/Coaches to students enrolled in the Professional Selling (PS) course. A large portion of the PS students’ semester grade is based on their ability to demonstrate their basic selling skills in video recorded sales call role plays. The primary responsibility of the manager/coach (APS student) is to help the PS students learn the basic selling skills in preparation for the role play sales calls. The APS students are told that they are accountable for the performance of the PS students in their sales call role plays.

#### **Directions**

Each APS student is assigned one to three PS students and instructed to initiate contact with those students. The APS students are required to arrange meeting times with those students in the video recording labs where they can engage in the training. APS students will answer questions, practice role playing, and model appropriate behaviors as they help prepare the PS students. They are also asked to write confidential candid evaluations of each of the students they are coaching, including an assessment of the students’ readiness for the sales call. The evaluations may include feedback on the PS students’ attendance (regarding the training sessions), strengths, weaknesses, overall attitude toward the assignment, and a prediction of how the student will perform in the sales call role play. The instructor can use these

reports to assess the extent to which the manager/coach (APS student) met the requirements of the assignment.

#### **Benefits**

Students benefit from this experience in several ways. First, the experience of teaching the skills to other students reinforces their own skill levels and helps them better understand the importance of the behaviors and concepts covered in the PS course. Second, the assignment gives them experience with being accountable for the performance of others, something they will experience in their professional careers. Finally, the exercise helps them understand the importance of effective time management (with respect to their own time management, and how others on whom they are dependent manage their time).

### **IN-BASKET EXERCISE (EXPERIENTIAL LEARNING EXPERIENCE)**

#### **Overview**

Many of the professional salespeople and sales managers that have visited our classes as guest speakers have told stories about how they’ve had to book a business trip on the spur of the moment. More than of few of these stories include problems resulting from things like failing to account for time zone changes, travel time (e.g., to and from the airport, or from a hotel to the account), or weather conditions (e.g., not taking a raincoat or umbrella to a location expecting a great deal of rain). These salespeople and sales managers point out that their walking into an account late, tired, soaking wet, or otherwise disheveled could have been eliminated through better travel planning.

This assignment gives students the opportunity to learn how to plan a business trip. In this exercise students must, in the role of a salesperson, plan a trip to a major city (located in a different climate and time zone) to visit with a major account. The scenario requires students to not only book their flights, but also make arrangements for a rental car and an overnight stay at a local hotel. Students then provide their sales manager’s (the instructor) an itinerary, expense estimate, and general description of the trip.

#### **Directions**

The instructor, in the role of sales manager, informs the students (in the role of salespeople) that a major account has called and asked for a representative to call on them in two days. The sales manager tells the salespeople that the company travel director has called in sick so each salesperson must make his/her own travel

arrangements. However, prior to finalizing the arrangements, each salesperson must submit for the sales manager's approval a report summarizing the travel arrangements, including a detailed itinerary, a cost estimate, time zone changes, the weather forecast, and what they plan to wear. Students are evaluated on the viability of their travel plans, the associated costs, and their ability to communicate this information in a professional manner.

### **Benefits**

The primary benefit of this exercise is better planning skills. While a few students are already sufficiently detail-oriented when it comes to business travel planning, most take this sort of planning for granted. Many expect to simply go online, quickly make the flight, hotel, and car arrangements, and then write it up and turn it in. They soon find that allowing for enough travel time (traffic conditions, security issues, equipment to bring, baggage fees, and so forth), accounting for weather conditions and time zone changes, and taking other business travel issues into consideration is a more complex task than they had thought.

This exercise is, in effect, a role play and is subject to some of the same advantages and disadvantages of using role plays in general (as educational tools). However, this experience adds additional realism in the sense that students must develop a workable travel itinerary based on real-world information (flight schedules, weather conditions, and so forth). The additional realism helps students realize that an assignment to make "simple" travel arrangements quickly turns into an exercise in time management and planning.

## **SALES MENTOR (SOCIAL AND EXPERIENTIAL LEARNING EXPERIENCE)**

### **Overview**

Turnover in the sales arena has been historically high (i.e., as much as 50% or more). Much of this may be attributed to new employees (i.e., recent college graduate not seasoned professional) not understanding what they are getting themselves into. By spending time in the field with a salesperson, observing and asking questions, students can gain greater insight into what a sales job entails on a day-to-day basis. This additional insight may serve to reduce turnover.

This assignment, which is based on social learning theory, requires students to find sales professionals who will serve as their mentors for the semester. Students spend time with their mentors in the field, observing and learning about the mentor's products, their jobs, and their customers. In addition, students must participate in two sales call role-plays in which they sell the mentor's

product. In the first role-play the students must sell the product to the mentor (role playing as a buyer). In the second role-play, the student must sell the product to one of the mentor's actual customers. This role-play is conducted in the field at the customer's location.

### **Directions**

Students are told they need to secure a mentor with whom they will work multiple times during the semester. The first step for the students is to identify a sales professional whom they would like to have as a mentor. Students are encouraged to identify potential mentors within companies or industries in which they would like to work after graduation. This helps them to begin developing their professional networks/relationships and gives them a chance to make sure those companies/industries are a good fit for them. Several sales professionals have agreed to participate in this program so the instructor can provide students help if they are having trouble identifying mentors on their own.

The second step is to secure that sales professional's agreement to serve as a mentor (which is a sales job in itself). Students must thoroughly explain to the prospective mentor the time commitment and level of involvement necessary to make the experience successful. This includes allowing the student to spend one or more days with the mentor in the field, having the mentor visit the campus to conduct the mid-term role-play, and allowing the student to make a sales call (that will be recorded) on one of the prospective mentor's customers. If the sales professional agrees to serve as mentor, the student can move onto the next step.

The next step requires the student to conduct an industry analysis with respect to the mentor's company, and an interview of the mentor to learn more about what that sales professional's job entails. Students are expected to learn, among other things, (1) what it takes to be successful in their field, (2) what their sales process looks like, (3) what role technology (i.e., CRM, etc.) plays in their company, and (4) what the typical selling experience is like. Next, students must also identify a buyer in the industry that this salesperson calls on and ask them a set of questions, including: (1) which salespeople get in to see them and why, and (2) which salespeople don't get in to see them and why?

After spending time in the field with the mentor, the student must engage in the midterm role play. During the midterm role play (conducted on campus and viewed by the rest of the class), students must sell the mentor's product(s) to the mentor who role-plays as a "typical customer" with whom the salesperson may call on. Students are evaluated on their ability to successfully demonstrate the appropriate selling and communication skills during the role-play. At the end of the role play, the mentor is given the opportunity to share with the rest of

the class information about their organizations and associated career opportunities. This gives the mentor access to all the students in the advanced selling course.

At or near the end of the semester, students make a sales call on one of the mentor's customers. The student must take a video camera and video record the entire sales call. Obviously this requires the willing participation of one of the mentor's customers. Depending upon the comfort level of the mentor and the mentor's customer, the sales call may be real or simulated. Either way, the sales call is conducted in the field with the student selling a real product to a real customer.

### Benefits

This active learning assignment, involving behavioral modeling and reproduction, provides several benefits. First, students get to observe sales professionals in action, learning what the lives of salespeople are like in

the "real-world." This observation helps socialize students into the world of the sales professional. Second, the mentors model sales behaviors in real-world settings, which helps students better understand the skills they are learning and adds credibility to the course instruction. Finally, feedback regarding students' ability to reproduce the selling behaviors (via mid-term and final) helps them hone their skills.

Perhaps the biggest benefit (at least from the students' perspective) is that students often find the relationship they establish with the mentor results in job opportunities, either with the mentor's company or through the mentor's connections. Students also report the experience provides them valuable insight that helps them better determine the type of sales career, if any, that is appropriate for them. Finally, the critical feedback they get from their mentors and the instructor during the semester helps them sharpen their selling and communication skills.

**TABLE 1  
SUMMARY OF LEARNING EXPERIENCES**

Experience	Type of Learning	Overview Experience	Cognitive/Skill Developed	Time Frame	Biggest Challenges
Immersive Learning Project	Immersive	Develop deliverable product (e.g., multimedia sales aid) for real-world organization	Cooperative/Teamwork; Time management; Reasoning; Problem-solving; Marketing communications; Multimedia software Planning and resource	Semester	Identifying client
Coordinating a Guest Speaker	Experiential	Coordinate all aspects of a guest speaker's visit	coordination; Decision-making; Budgeting; Intra-organizational communications; Interpersonal communications	Two weeks (once speaker is identified & contacted)	Scheduling appropriate meeting space; Making sure all technology needs are met.
Manager/Coach	Experiential	Work with students in intro sales courses	Teaching/coaching; Interpersonal communications; management; sales knowledge and behaviors	Two to four weeks	Coordinating meeting times with other students
In-Basket	Experiential	Develop a detailed travel agenda for a sales-trip	Planning and resource coordination; Time management; Intra-organizational communications	One day	Taking in to account adequate travel time (e.g., to and from airport, fees, and sales tools/aids to take.
Sales Mentor real	Social & Experiential	Learn from professional salesperson (mentor) through observation  interaction and role play; sell to one of mentor's customers	Observation; Interpersonal communications; Time management; sales knowledge and behaviors	Semester	Coordinating mentor's campus visit role-play; Coordinating sales call on actual customer.

## STUDENT FEEDBACK

After each exercise and at the end of the semester the instructor provides students the opportunity to provide feedback regarding the assignments. While not tracked empirically, the instructors report the most common themes discussed in the feedback are workload and value of the assignments. Comments like “. . . your class may have been one of the more challenging classes, but I have gained experience that will last a lifetime, Thanks for a stressful . . . but fulfilling semester” are not uncommon. Although students indicate the workload is greater than the workload of most other classes, they often concede it is manageable. Further discussion usually reveals the students who had trouble managing the workload were the ones who procrastinated, waiting until the last minute to begin working on the assignments.

Feedback from students also indicates the assignments provide greater value than those of other courses. Students appreciate and value the opportunity to interact with the “real-world” and engage in activities that help them better understand and identify with what it’s like to be a professional salesperson. For some students, the coursework helps them determine that a particular company, industry, or job type is a good fit for them, for others it helps them determine that a particular company, industry, or job type is not a good fit for them. The latter is beneficial not only to the students, but to the companies who may have hired those students.

## CONCLUSION

As business school educators, our job is to help students develop their cognitive and behavior skills in general, and more specifically as they relate to preparation for careers in business. Evidence suggests active learning approaches to teaching (more specifically, social, experiential, and immersive learning experiences) do a better job of educating students and preparing them for careers than passive learning experiences.

Following the systematic approach to active learning described by Auster and Wylie (2006), the exercises described in this paper utilize active learning formats in both simulated and real-world settings. The intent of including real-world experiences is not only to enhance the learning of the skills, but also to help socialize the students into the role of a professional salesperson. Students expect to engage in these exercises as they would (or will) in their professional lives. The experience, reflection, abstract observation, and active experimentation (role plays) associated with these experiences/exercises help promote more accurate anticipatory socialization – giving students greater confidence in their abilities and greater confidence in their expectations of what life will be like as professional salespeople.

Fostering more accurate anticipatory socialization

may reduce entry-shock, leading to greater job satisfaction. And as existing research indicates, greater job satisfaction lowers the probability of turnover. Additional research is needed to empirically exam/test these relationships within the context of college graduates taking entry-level sales positions.

Successful implementation of these exercises requires commitment from the instructor, the students, and the participating sales professionals and organizations. However, the setting up and successfully executing these experiences provides benefits to each of the parties involved. Faculty stay connected to business professionals which helps to enhance and keep relevant their understanding of current business practices. These experiences also provide faculty the opportunity to build a network of business contacts. Properly managed, this network can improve recruiting opportunities for students and lead to financial support for grants, scholarships, and other educational initiatives.

Participating sales professionals benefit from the increased recruiting opportunities arising from greater access to the students. Serving as a mentor gives the entire class greater exposure to the mentor’s organization and associated career opportunities. Students learn from the mentors’ presentations and informally from the mentees. In effect, the mentees serve as ambassadors for their respective mentors and mentors’ organizations.

Students are likely to begin the course with some trepidation, primarily due to what they perceive as a significant workload. However, as the course settles in and students have the opportunity to engage in these learning experiences, they quickly realize the potential value to be derived from engaging in the learning process. Although not empirically tested, this engagement should lead to greater commitment to the learning process. Finally, students typically report (once they graduate) that they are better prepared in terms of expectations and skill sets than their counterparts (those without a sales education) for their sales careers. Below are examples of feedback from alumni who (at the time) had recently graduated and taken jobs in sales (b2b).

“The main thing that I wanted to relay back to you and [the other instructors] is that the things that you are doing in the [sales course are] real world and the best that it can be. I am as equipped if not better equipped than anyone else in my training class.”

“. . . the students think there is a difference between textbook, and real world and you are doing a great job of blending [these] together to get someone better prepared than any other school out there. Please continue pushing the envelope and developing great curriculum.”

“I wanted to write and say thank you for preparing me for my career in sales. I accepted a sales position for the [a company] in San Leandro, CA last July, and I never had the chance to show my appre-

ciation for how well the sales program actually prepared me for this job. There are so many parallels with what you teach in the program and what I use every day at every call."

As sales recruiters increasingly turn to schools teaching sales to hire the next generation of sales professionals, those schools will need to find ways to enhance students' preparation for sales careers. By improving

students' skill sets and initiating the anticipatory socialization process, our objective is to increase students' chances of success, and reduce the likelihood of turnover resulting from unrealistic expectations (as to what a sales job entails) and a lack of preparedness. Our experiences suggest the sorts of active learning experiences described in this article are the best way to achieve that objective.

---

## REFERENCES

- Auster, Ellen R. and Krista K. Wylie (2006), "Creating Active Learning in the Classroom: A Systematic Approach," *Journal of Management Education*, 30, 333-53.
- Bobbitt, L.M., Scott A. Inks, Katie J. Kemp, and Donna T. Mayo (2000), "Integrating Marketing Courses to Enhance Team-Based Experiential Learning" *Journal of Marketing Education*, 22, 15-24.
- Bridges, E. (1999), "Experiential Learning and Customer Needs in the Undergraduate Marketing Research Course," *Journal of Marketing Education*, 21, 51-59.
- Castleberry, Stephen B. (1989), "Videotaped Role Playing in the Personal Selling Classroom: A Practical Guide," *Journal of Marketing Education*, 11 (April), 33-39.
- Dubinsky, Alan J., Roy D. Howell, Thomas N. Ingram, and Danny N. Bellenger (1986), "Salesforce Socialization," *Journal of Marketing*, 50 (4), 192-207.
- Frontezak, N. (1998), "A Paradigm for the Selection, Use and Development of Experiential Learning Activities in Marketing Education," *Marketing Education Review*, 8 (3), 35-44.
- Graeff, T.R. (1998), "Writing Behavioral Learning Objectives for Marketing Courses: Meeting the Challenge of AACSB Outcomes Assessment," *Marketing Education Review*, 8 (1), 13-25.
- Gremler, D.D., K.D. Hoffman, S.M. Keaveney, and L. Wright (2000), "Experiential Learning Exercises in Services Marketing Courses," *Journal of Marketing Education*, 22, 1.
- Hamer, L.O. (2000), "The Additive Effects of Semi-Structured Classroom Activities on Student Learning: An Application of Classroom-Based Experiential Learning Techniques," *Journal of Marketing Education*, 22, 25-34.
- Ingram, Thomas N. and Keun S. Lee (1990), "Sales Force Commitment and Turnover," *Industrial Marketing Management*, 19 (2), 149-54.
- Johnson, Laurence F. and Alan H. Levine (2008), "Virtual Worlds Inherently Immersive, Highly Social Learning Spaces," *Theory into Practice*, 47, 161-70.
- Karns, G.L. (2005), "An Update of Marketing Students Perceptions of Learning Activities: Structure, Preferences and Effectiveness," *Journal of Marketing Education*, 27, 163-71.
- Klebba, J. and J.G. Hamilton (2007), "Structured Case Analysis: Developing Critical Thinking Skills in Marketing Case Courses," *Journal of Marketing Education*, 29 (2), 132-39.
- Kolb, Alice Y. and David A. Kolb (2005), "Learning Styles and Learning Spaces: Enhancing Experiential Learning in Higher Education," *Academy of Management Learning and Education*, 4 (2), 193-212.
- Kolb, David A. (1984), *Experiential Learning: Experience as the Source of Learning and Development*. New Jersey: Prentice-Hall.
- McBane, Donald A. and Patricia A. Knowles (1994), "Teaching Communication Skills in the Personal Selling Class," *Marketing Education Review*, 4 (Fall), 41-48.
- Moncrief, William C. and Shannon Shipp (1994), "Making Personal Selling Role Plays More Realistic," *Marketing Education Review*, 4 (Spring), 45-49.
- Paulson, Steven K. and H. Eugene Baker, III (1999), "An Experiential Approach to Facilitate Anticipatory Socialization," *The International Journal of Organizational Analysis*, 7 (4), 365-78.
- Roy, A. and B. Macchiette (2005), "Debating the Issues: A Tool for Augmenting Critical Thinking Skills of Marketing Students," *Journal of Marketing Education*, 27 (3), 264-76.
- Sautter, P. (2007), "Designing Discussion Activities to Achieve Desired Learning Outcomes: Choices Using Mode of Delivery and Structure," *Journal of Marketing Education*, 29 (2), 122-31.
- Sojka, J.Z. and M.S. Fish (2008), "Brief In-Class Role Plays: An Experiential Teaching Tool Targeted to Generation Y Students," *Marketing Education Review*, 18 (1), 25-31.
- Tanner, Jr., John F. and Larry B. Chonko (1992), "Avoiding the Guillotine Effect After Video-Taping Role Plays," *Marketing Education Review*, 1 (Spring), 37-41.
- Widmier, Scott, Terry Loe, and Gary Selden (2007), "Using Role-Play Competitions to Teach Selling Skills and Teamwork," *Marketing Education Review*, 17 (Spring), 69-78.
- Young, M.R. (2005), "The Motivational Effects of the Classroom Environment in Facilitating Self-Regulated Learning," *Journal of Marketing Education*, 27, 25-40.

# WHEN TWO WORLDS COLLIDE: AN EXPLORATORY STUDY OF FOREIGN-BORN PROFESSORS' TEACHING EXPERIENCES IN AMERICAN BUSINESS CLASSROOMS

*Haiyan Hu, Utah State University  
Stacey Hills, Utah State University*

## ABSTRACT

*This paper seeks to identify the challenges facing foreign-born professors (FBPs) teaching in American business classrooms. We interviewed 10 foreign-born faculty members of various tenure standing and in various disciplines at three universities. Our study showed that language skills and differences in educational systems between the U.S. and FBP's home country have a tremendous impact on the teaching effectiveness. FBP's self-reference criterion may aggravate the problems they face in their early teaching career. Our study revealed the strategies that FBPs used to adapt which include changing attitudes and changing teaching methods from pure lecturing toward more interactivities.*

## INTRODUCTION

Currently, a large number of foreign-born professors (FBP) teaching business courses in American universities. As of the 2006–2007 academic year, approximately 1168 foreign-born faculty teaching in AACSB accredited business schools in the United States (AACSB Business School Questionnaire 2007). Their positions within AACSB institutions suggest that these individuals are knowledgeable enough in their disciplines to teach students the finer points of business. However, despite their expertise, many of these faculty members experience a great deal of difficulty in the classroom. Some existing research examining the teaching effectiveness of foreign-born teaching assistants (TAs) have shed some lights, given that many TAs would later become foreign-born professors. For example, based on a survey of undergraduate students, foreign-born TAs were found having an adverse effect on the academic performance of native students (Marvasti 2005). Responding to this widespread perception of lower teaching effectiveness of foreign-born teaching assistants, thirty-eight states have mandated oral English language competency standards and/or short courses. What is implied in this mandate is the belief that language skills caused the teaching ineffectiveness among foreign-born TAs. In addition to linguistic problems, other factors such as “department training, prior teaching experience, social skills, difficulty of discipline, and cultural differences” can all determine foreign-born TAs' teaching effectiveness (Marvasti 2005,

p. 155). Furthermore, foreign-born TAs received lower teaching evaluations and it was partly attributed to the undesirable classroom environment due to the cultural gap between the foreign-born teachers and the native students. But no details were offered as to what aspects of culture that affected teaching evaluations (Fleisher, Hashimoto, and Weinberg 2002). As far as FBPs are concerned, challenges also include “prejudicial stereotypes about foreign-born faculty, which comprise beliefs about their inferior ability as out-group members to perform task.” (Marvasti 2005). Because a faculty member plays a more significant role in student learning and takes on heavier teaching responsibilities than a TA, more research is needed to examine FBP's teaching experiences directly. One study used secondary data collected by the U.S. Department of Education to investigate the perceived effectiveness of FBPs (Marvasti 2005). It compared FBPs with native professors in teaching, research, and service. But the measures used to assess teaching mainly concerned with the time allocated to teaching activities, thus did not help us understand the teaching effectiveness of FBPs. In summary, compared to their native-born peers, FBPs may experience additional challenges that were particularly incurred by cultural differences.

Given increasing FBP population in American business classrooms and lack of research that examines specifically their teaching experiences, this paper seeks to investigate the common challenges facing foreign-born faculty teaching in the American business class-

room, examine the underlying factors that contribute to the problems, and provide advice to overcome these obstacles. Considering that FBPs teaching in American classroom is one example of cross-cultural education, we begin by reviewing the literature on cross-cultural teaching. We then present the research methodology, followed by a discussion of the findings. The final sections contain implications for improving the teaching effectiveness of FBPs and directions for future research.

## LITERATURE REVIEW

Due to the lack of specific research on FBP's experiences in American business classrooms, our literature review focuses on general cross-cultural teaching studies with an emphasis on business. The existing literature suggests two areas where difficulties can arise, including: (1) culture and language, and (2) classroom etiquette and expectations.

### Challenges of Culture and Language

Hofstede (1980) identified four dimensions along which cultures can be examined for similarities and differences: Power Distance, Uncertainty Avoidance, Individualism/Collectivism, and Masculinity/Femininity. He further noted that the greater the differences between nations on these dimensions, the more challenging interaction between people of those cultures could be in an organizational setting. Educational experience is partly culture-based, and indeed, the experiences of several American professors teaching abroad seem to support Hofstede's theory. Lindahl and Finelli (2002) noted that without changes to content or delivery, course satisfaction can diminish when a course is transplanted from one culture (U.S.) to another (French) with no adaptation. Examining an MBA program between Spanish students and American/British professors, Aram (1994) found that, consistent with their previous education experiences, Spanish students expected an inequality between students and professors, low interaction, and the inability to voice their opinions. Course content was expected to be highly theoretical and memorization was encouraged. Students expressed a high concern for obtaining a good grade, and the quality of the professor was based on the grade received. Students displayed an "us vs. them" mentality, bonding together against foreign faculty members. In contrast, the British and American faculty had different expectations. They assigned grades based on student effort and performance, and expected punctuality, preparation, attentiveness, and participation. Exams and course content were more applied.

One important component of culture is language. As Usunier and Lee (2005) note, language encompasses the verbal and non-verbal aspects of communication be-

tween people, and provides much of the context for understanding the meaning of words, gestures, and symbols. As such, many of the difficulties that arise in transitioning between cultures stem from language misunderstandings. In the professor-student dyad, existing studies mainly addressed the language problems foreign students encountered studying in American institutions (Dao, Lee, and Chang 2007; Yeh and Inose 2003). For example, several studies found that students with lower levels of English fluency tended to have more difficulty adjusting to the American classroom experience (Dao, Lee, and Chang 2007; Yeh and Inose 2003; Hayes and Lin 1994). What happens, however when the dyad changes to one between a foreign-born professor and a native-speaking American student? In one study, 22 percent of foreign-born faculty surveyed recognized that their accent could be a barrier to their teaching effectiveness (Manrique and Manrique 1999).

### Challenges of Classroom Etiquettes and Expectations

As Aram (1994) and Lindahl and Finelli (2002) suggested students are acculturated to certain classroom styles and behaviors that are unique to different cultures/nations, and these are carried with them through their higher education experiences. For example, "Prior studies have shown that Asian students may have particular difficulty in understanding the body of marketing knowledge due to differences in learning styles, relationships with teachers, familiarity with lectures, communication barriers, commanding influence of the family, and societal attitudes toward failure" (Clarke and Flaherty 2003, p. 119).

Learning style is defined by Rodrigues (2005, p. 609) as "the elements of individual differences that are important to knowledge and skills acquisition." It is indicative of how an individual learns or the best way to acquire and retain information for later recall. He notes that learning styles become instituted in students as a result of their continued reinforcement in classrooms and at home. For example, Asian students focused on memorization rather than critical thinking. Coupled with language problems, Asian students are less likely to participate in class discussions. There is a preference for the "one right answer" and a focus on conveying ideas in writing (Rodrigues 2005). Lindahl and Finelli (2002) found similar support for the "right answer" preference in their accounting course at a European Business School. Students in that study were clearly less comfortable with the American model of discussion and uncertainty, as well as the possibility of multiple outcomes. On the other hand, American students preferred class discussions when compared to their foreign-born counterparts (Rodrigues 2005).

The expectations of professors' roles in classroom also vary across cultures, and can have a profound effect

on the classroom environment (Tompson and Tompson 1996). For example, Asian students view their faculty as authority figures who command a degree of respect. Thus, confrontational behavior is very low, as is approaching faculty with a problem.

Related to the classroom dynamic are the specific teaching methods used by a faculty member. Ulrich (2005) identified the top 10 methods that were considered “helpful” in facilitating learning by American business majors: (a) internships, (b) applied lectures, (c) case analysis, (d) expert talks, (e) group projects, (f) case studies, (g) cooperative learning, (h) homework, (i) small group discussion, (j) programmed instruction. Given that foreign-born faculty spend anywhere from 12 to 17 years in their own educational culture before transitioning to academic life in another culture, they will most likely carry what they learn as students into their own classrooms. The American-born professor may instinctively create a class that is highly participative and focused on discussion, where the foreign-born professor may tend toward the memorization and strong theory focus that was the cornerstone of their own academic experience.

In summary, there is lack of research specifically examining foreign-born faculty’s experiences in American business classroom. This study intends to explore the following: What is their first-year teaching experience? What factors may affect their teaching effectiveness? Finally, how have their teaching strategies evolved over the years and what pedagogies have proved successful?

## RESEARCH METHODS

In depth personal interviews were conducted to collect foreign-born faculty’s personal accounts of their teaching experiences. Compared to close ended survey questions, this method would allow us to probe the challenges faced by foreign-born faculty in greater depth, without imposing preconceived options or opinions. The following sections present the instrument used for the in-depth interviews, the sampling method and data analysis method.

### Instrument

We chose to use a semi-structured interview guide that contained main questions that address the research questions and still leave room for developing personal rapport for further probing (Miles and Huberman 1994; Rubin and Rubin 2005). Three faculty members in the College of Business of a large public university in the Western U.S. pretested the guide. The resulting interview guide addressed four areas: Graduate school experiences, Career teaching experiences, Teaching styles/pedagogies, and Suggestions on preparing for teaching in American classrooms.

### Sampling

The sampling process served two goals. First, we must establish credibility with a sample including interviewees who are experienced and knowledgeable of the subject matter and more importantly can provide a variety of perspectives (Rubin and Rubin 2005). In addition, given its exploratory nature, the sampling was open in the investigation to anyone who provided the opportunity for discovery. In other words, sample size evolved until reaching theoretic saturation or no new information or data seemed to emerge with regard to the research questions (Strauss and Corbin 1998). As a result, the authors interviewed a convenience sample of 10 foreign-born faculty members from three universities through snow-balling technique, with consideration of balance in terms of gender, native culture, tenure, and discipline (see Table 1). All participants have taught for at least two years. The interviews averaged between about 30 minutes and two hours, using both audio recording and researcher notes. Researchers contacted participants personally. Interviews were conducted in English, which was the second language for all but one interviewee. As shown in Table 1, our participants came from various business disciplines thus providing a sound foundation which should uncover the common challenges faced by foreign-born business professors.

### Data Analysis Method

All audio-taped interviews were transcribed to facilitate data analysis. To explore their experiences, it is necessary to develop a scheme to code the verbal responses gathered from the interviews. A coding scheme composes a set of codes used to retrieve the “chunks” of information that have meanings attached to them, and then organizes them so that a researcher can cluster the “chunks” of similar meanings together to find the answers to a research question. One can construct a coding scheme based on the research question, the conceptual framework, or the hypothesis (Miles and Huberman 1994). But because of the exploratory nature of this research, we utilized an open coding method instead to extract the major themes or categories of teaching experiences of FBPs. Open coding is a process where “data are broken down into discrete parts, closely examined, and compared for similarity and difference” (Strauss and Corbin 1998, p. 102), without a predefined coding scheme. Two research assistants who have had training in this type of data analysis completed the coding task. They independently read and reviewed the transcripts line by line, generated labels/codes for “chucks” that contain distinctive meanings, and then compared and revised codes continuously. At the end of this process, each derived a list of codes related to each question contained

**TABLE 1**  
**DEMOGRAPHIC CHARACTERISTICS OF FOREIGN-BORN PROFESSOR PARTICIPANTS**

Variable	Range	Frequency (n = 10)
Gender	Male/female	6/4
Tenure:	Assistant professor	5
	Associate professor	2
	Full professor	3
Disciplines	Marketing Management	3
	Economics	4
	Management Information System	1
	Finance	2
Native Culture	European (U.K., Hungary, Russia, New Zealand)	4
	East Asia (Korea, China)	3
	South Asia (India)	2
	Mid East (Iran)	1

in the interview guide. The next job is check-coding where the two assistants compared the codes they each developed and discussed the discrepancies. After lengthy discussions, some disagreements were resolved and some still existed (see the final list of codes in Table 2). The inter-rater reliability was calculated before and after the discussion to assess the reliabilities of the analysis. Inter-rater reliability is the ratio between the number of agreements in codes and the total number of codes. Higher inter-rater reliability implies more agreement among raters of the codable blocks (Miles and Huberman 1994). The inter-rater reliability improved from 84 percent to 92 percent after the discussion. A reliability score above 90 percent is the conventionally agreed-upon cutoff for inter-rater reliability (Miles and Huberman 1994). Therefore, it was reasonable to conclude that the codes developed from the data were valid and effective in distinguishing different meanings.

## RESULTS AND FINDINGS

In this section, we will present our findings of FBPs' experiences in American business colleges. We consider the experiences of their first year, and then focus on the factors that may have impacts on their teaching experiences. We also examine their teaching styles especially how they have evolved over time and successful strategies FBPs have developed to adapt to American student body. Finally, we present suggestions and recommendations to American graduate school and foreign-born doctoral students who are in preparation for American academic life.

### First Year Teaching Experiences

We began by asking faculty to discuss their early teaching experiences, with a focus on their first year. This question produced a wide range of responses:

*"It was actually pretty good"* (New Zealand, Economics).

*"It was really hard"* (Hungary, Management Information System).

*"That was the worst experience"* (Iran, Economics).

*"I remembered that internally I struggled a lot. It may not be obvious to students but I remembered often times I didn't want to go to school or be part of it"* (Korea, Marketing Management).

When probing the reasons for challenges, culture, and language seemed to play a role, with "difficulty with accent," "new student culture," and "new university" all being cited as issues. Given the heightened importance of rapport and communication in the American classroom, it was not surprising to find that language issues presented a unique challenge. As noted by our participants:

*"I did have one student who told me she did not understand one word that I said and she could not understand the way I said her name"* (Iran, Economics).

*"I had to prepare a lot because I was a foreigner. I wasn't very comfortable with English even at that time. I spent lots of time coming up with sentences, making sure that I was prepared and not making a fool out of myself"* (Korea, Marketing Management).

**TABLE 2**  
**LIST OF CODES**

First Year Teaching Experiences (FYTE)

FYTE: Positive

FYTE: Negative

- ◆ Communication problems (language, accent)
- ◆ Different student cultures
- ◆ Teaching above student levels
- ◆ Large class size

Factors that Influence Teaching Effectiveness (TE)

TE: Linguistic problems

- ◆ Accent
- ◆ Pace of speech
- ◆ Could also be Excuse of troubled students
- ◆ Limited use of humor due to its cultural background

TE: Country differences

- ◆ No influence due to social or political differences
- ◆ Culture differences in educational systems (authoritarian vs. interactive orientation)

TE: Classroom etiquette

- ◆ Less respectful students
- ◆ More informality

TE: Demographic characteristics

- ◆ Gender – male authority
- ◆ Younger look could be taken advantage of
- ◆ Ethnicity

Teaching Styles (TS)

TS: Successful teaching strategies

- ◆ Engage students with more interactivities and hands-on exercises
- ◆ Understanding individual needs/abilities
- ◆ Set clear expectations

TS: Evolvement of classroom styles

- ◆ Less lecturing and more interactivities (discussions, cases, projects)
- ◆ Being more specific on learning goals/expectations
- ◆ Adjust to student abilities

TS: Most often used pedagogies

- ◆ Case studies
- ◆ Group projects
- ◆ In-class discussions
- ◆ Lectures
- ◆ Guest speakers
- ◆ Community/service learning
- ◆ Field trips

Better preparation for the academics: (PA)

PA: Preparation in the graduate programs

- ◆ Assistant teaching programs to gain experiences with undergraduate students
- ◆ Opportunities of class observations of master teachers

PA: Self-preparation

- ◆ Get teaching experiences
- ◆ Improve communication skills/English
- ◆ Maintain positive and open attitude

In addition, issues such as unrealistic expectations of students and large class size were also indicated.

### Factors that Influence Teaching Effectiveness

Our participants identified issues such as language problems, country differences in the area of educational system, classroom etiquette, and demographic characteristics may affect their teaching effectiveness.

*Language.* Here language again affects teaching effectiveness of FBPs.

*"I think that [language] affected my teaching because we did not always understand each other because of my accent" (Russia, Economics).*

Fortunately, as our interviews revealed, the language problem tends to become less of an issue as faculty advance in their tenure track and start to develop strategies to cope with their language issues. An interesting point brought up by some of our interviewees is the use of humor in class. Given the complex socio-cultural meanings embedded in humor, our FBP participants were cautious about using humor in classroom.

*"I have to be a lot more careful of what type of humor because there is a large number of a fairly unknown background in individuals so I have to tone down the humor. Because even milder things can offend somebody, and that is especially true in a more religious area" (Hungary, Management Information System).*

**Country Differences.** Differences in social or political systems between our participants' home countries and the U.S. did not seem to have any effect on teaching effectiveness. But differences in the culture of higher education systems did seem to affect teaching performance. For example, many of our interviewees attended institutions at home that were dominated by authoritarian, lecture-based classes, whereas heightened degree and depth of interaction with the students is one of the most distinguishing features of the American business classroom. As a result, adapting to a more open and participative style proved difficult. For example:

*"Because I have 16 years of educational experience in Korea and I am used to the Korean way of teaching. I also have some experience in the American classroom, but I have habits that I brought with me from Korea . . . In the United States it is more applied, it is more interactive" (Korea, Finance).*

*"In my program . . . there were pure lectures. There was not a lot of problem solving and not much interaction in them" (Hungary, Management Information Systems).*

*"Yes well this was a different teaching style than even in Europe. The teachers don't really seem to have authority here" (Russia, Economics).*

Interactivity creates a performance aspect to teaching, as well as a need for innovation. Success requires

extending beyond traditional lecture to a more varied pedagogical approach. Information needs to be current and relevant, and students should have the opportunity to apply the material in a direct manner (through projects, assignments, etc.). Just like one of the participant commented,

*"Basically here you have to have a smile on your face. To a large extent being a professor here is more like being a performer. In Iran, students don't care if you are looking at them or writing on the board. Performance is a big part of the grade here when it comes to (student) evaluation" (Iran, Economics).*

**Classroom Etiquette.** The informality of relationships between students and faculty, both in and out of the classroom, is perhaps the most discomforting to our interview participants. American students have a strong sense of equality with faculty members, and seem to expect that their ideas will be respected, whether or not they are correct. Consider the following comments:

*"They think that you are their equal. They like to refer to you by first name. Much, much more informal. In my country professors were there to tell us, and were not there to be challenged. . . . It was not customary to challenge or to ask questions right on the spot. You have to give more respect and not only in verbal communication but behavior too" (Hungary, Management Information Systems).*

In many home cultures of our participants, being respectful is associated with showing obedience without challenging the authority of the teacher. But American students do not seem to infer any particular authority from the degree itself. To them, it is only how knowledge is conveyed that seems to bear any significance. Thus, this classroom informality tended to be perceived by our participants as disrespectful behaviors:

*"I am uncomfortable with a certain amount of informality. I don't think it is appropriate to refer to your professor by their first name. For example, I don't think they have the same degree of respect for teachers that I was used to when I was a student" (Hong Kong, Marketing Management).*

*"In India, we have to respect the teacher and we have to show non critical obedience and we have to listen to what the teachers say. That is the tradition and culture. Here in the U.S. what is important is that the students ask the teacher questions" (India, Economics).*

**Demographics Characteristics.** Sometimes, demographic characteristics such as ethnicity and gender seemed to play a significant role. Consider the following comments:

*"I think being a woman is not a good thing. Being an Asian woman is particularly not good. Being a younger-looking person didn't help either. Had I been a European male, 6 feet tall with Euro-*

pean accent, things could have been easier” (Korea, female, Marketing Management).

### **Evolvement of Teaching Styles: What’s Working**

In our study, we are interested in learning what strategies these foreign-born faculty members have developed to address the different learning styles of American students, especially how their teaching styles may have evolved over time. All participants, including those on tenure-track and those well-established full professors alike, mentioned the inevitable adaptation of their teaching styles to the American students’ learning styles and specific classroom behaviors. For our participants, the evolution from the first year usually took place in following areas:

1. Adjust to student learning abilities. Typically, our interviewees came to the U.S. for graduate studies. With no prior experiences with American undergraduate students and classrooms, they were likely to use their own countries as a point of comparison, and often developed higher and unrealistic expectations for the students’ academic abilities than what the students themselves expected.

*“I changed from my first semester of teaching. I thought in the beginning that I was supposed to teach them as much knowledge as possible. This was not appreciated by the students, so I changed the course content to meet the needs of the class and take it down to focus on essential knowledge” (Korea, Finance).*

2. Set clear expectations for students. Several participants emphasized the importance of setting clear expectation for students.

*“Probably one of the things that I do more consciously than I did in my first years is that I explain my expectations thoroughly. I try to make sure that the students clearly understand my expectations and I didn’t do this in my first years. . . . I spend more time trying to make sure that they understand the expectations than I did before” (India, Finance).*

3. Given that American students prefer informal interaction to formal lecturing, almost all of the professors in our study have evolved to include more student activities in the classroom. They couldn’t emphasize enough the importance of involving students in the learning process, which probably was not considered a top priority by the professors in their home countries. For example:

*“I do less lecturing and more discussions and more team projects. I try to get them involved in doing things on their own. That’s pretty much my major lesson. . . . The feedback always comes back*

*that is when they always learn the most when they are in these project situations” (Hungary, Management Information Systems).*

### **Suggestions for Better Preparing for American Academia**

Our interviewees make suggestions to the American doctoral programs to better prepare foreign-born students for teaching in the U.S.:

1. Provide teaching opportunities: most of our respondents strongly recommended that graduate schools should provide teaching opportunities for foreign graduate students, especially those who are interested in teaching in US in the future. They should be given the responsibility to teach the whole class, rather than being a teaching assistant for a professor. These teaching opportunities will prepare graduate students for the changing student expectation.

*“Understanding what the American students are thinking all you [need] to be a little more aware of what might need to do to adapt. . . . A lot of it is more cultural adjustment. Not so much teaching as much as understanding what is different about how were taught (sic.) and how that is different from American students, so that at least you can close the gap” (India, Marketing Management).*

2. More mentoring from master teachers: One senior member of our participants suggested:

*“Maybe have them sit in some expert teachers classes. There are some people that are master teachers and I don’t think that any of the universities take the time to tell the doctoral students that they should attend at least one lecture by one of these master teachers. That would be an incredible source and very beneficial to the students. I think that should be a required part of the program” (India, Finance).*

3. A required course in teaching: One participant mentioned one teaching course he took in graduate school.

*“It was about teaching methods, preparing undergraduate students and how to do certain things in the classroom, classroom management. I had to interview the two professors from our own department and write sort of a journal” (Hungary, Management Information System).*

Our interviewees also make recommendations to the foreign graduate students to better prepare themselves before assuming teaching roles in American universities. In addition to gain teaching experiences, they suggested:

1. Improve English Skills. No one seemed to emphasize enough the importance of good English skills.

*“I think that when they don’t have very good*

*English skills it is not fair for the students taking their classes” (New Zealand, Economics).*

*“We have accents and we can’t hide them. That is probably my lifetime effort. The second thing is to fill up the gap between our communication and our knowledge. It is a problem because we know what the answers are but we can’t express that” (Korea, Finance).*

2. Develop an Open and Positive Attitude. This is particularly important for foreign-born professors as they eventually all have to learn that adaptation is a must for them to become a seasoned academia. Many of our participants indicated the whole process of adaptation is more or less frustrating. None underestimated the psychological impact the teaching experiences have on their academic life. Therefore, a positive attitude seemed to be the key to their success.

*“Well just be more firm and be more open and have more of a positive attitude” (Russia, Economics).*

## DISCUSSIONS AND RECOMMENDATIONS

Our study suggests that to foreign-born professors, successful transition to the American classroom is largely a function of cultural adaptation. These adaptations may include improving language skills, understanding student expectations in terms of appropriate classroom behaviors and professor-student relationships that may be vastly different from their own educational experiences, and adjusting teaching styles to different student learning styles. Based on what we have learned from our participants, we recommend the following steps as a guide for all foreign-born business professors to help them navigate smoothly through their early teaching years:

1. Gaining sensitivity – the first step in a successful transition to a different culture is to be aware of the different levels at which cultural influence is conveyed. For an American student, these influences can take several forms, ranging from broad to specific. First, there is the “American” national culture which helps to define the nation and its values. Second, there are also state and regional influences that help to further develop cultural nuance. It is important to recognize these differences as they can influence the classroom in terms of language and expectations. A student born and raised in New York State, for example, might be very different from a student born and raised in the state of Nebraska. Last, there may be issues of university or educational culture. Currently, educational systems are managed largely at the state level, and the large number of colleges and universities provide the opportunity for schools to develop

“personalities” that attract certain types of students. As such, it is important to not only learn about the general area/university but the wider culture as well. Interestingly enough, our studies suggested that it is not the differences of national cultures but the characteristics of different educational cultures (authoritarian, lecture-based vs. interactive, student-oriented) have direct impact on the teaching effectiveness among our FBPs. Thus, sensitivity to the cultural influences at different levels will help FBPs set realistic expectations for student classroom behaviors and academic performances.

2. Acquiring Knowledge – once a general awareness has been built, specific knowledge of your students and classroom environment can be developed. This knowledge focuses on knowing “what” – what are the expectations of students and/or faculty colleagues? What level of interaction is appropriate for a given type of course? How much formality is comfortable in my relationships with students? This knowledge helps to identify points of difference and potential means of minimizing those distances. But as revealed by our participants, the obstacle here for FBPs is the notion of self-reference criterion (SRC) or the tendency of unconsciously referring one’s own cultural values, experiences, and knowledge as a basis for judgments or decisions. Hence it is common among our FBP participants to have heightened expectations about student abilities, misperceptions about appropriate classroom norms related to interactivity and etiquette, etc. In our study, all participants came to realize eventually the SRC’s influence on the problems they face in teaching and took measures to address them or make adjustment. We would recommend proactive measures for FBPs to (1) understand the problem at hand in both American and home culture contexts with no value judgment, (2) examine the influences of SRC on this problem, and (3) develop teaching strategies to address this problem without SRC influence. At this stage, attending teaching clinics, reading about effective pedagogies and having courses reviewed by master teachers can all contribute to narrowing the knowledge gap of American business classrooms and creating an effective learning environment.

3. Understanding Intangibles – Rapport with students in and out of the class can serve as a true performance asset if attention is given to the subtler aspects of the interaction. For example, be aware of how body language, gestures and tone of voice might be perceived by students.

Our interviewees have all learned over the years that it is essential to fine-tune the delivery of course content to create a more favorable environment and that outlining specific behavior expectations in the syllabus can minimize “disrespectful” behavior. It is imperative that foreign-born professors attend to non-verbal cues and respond to student concerns to clarify precisely the issue or comment at hand. Given the lower power distance in American society, for FBPs from cultures of higher power distance, it is also important to attend to the need of the student to have his/her ideas valued and respected. Other approaches that have proven successful include providing recent and relevant examples of concepts, engaging in a transparent process (i.e., explaining what students will learn and why an assignment is important) which was often non-existent in an authoritarian educational system, and providing greater instructional guidance for students.

### **CONCLUSIONS AND DIRECTIONS FOR FUTURE RESEARCH**

The transition to life as a faculty member is seldom easy, and can be more difficult for the foreign-born business professors adjusting to the American classroom. Our study showed that language skills have a tremendous impact on the teaching effectiveness. Differences in educational systems between the U.S. and FBP’s home countries significantly hinder their understanding of American student’s motivations which may in turn affect their expectation of classroom behavior and the role that a professor plays in the learning process. FBP’s self reference criterion may aggravate the problems they face in their early teaching career. Our study revealed the adjustments that FBPs have made to adapt which include changing attitudes and expectations toward student classroom behaviors, and changing teaching methods to move away from pure lecturing toward more interactions and emphasizing student involvement.

One theme that held true to almost every interviewee was the constant internal struggles that they have endured, especially in the early years of their career. These internal struggles have led to emotional or psychological drain among many of them. The consequences can range from frustration, destruction of self-confidence, and sometimes negativity toward teaching and increasing distrust and alienation from the students. As the business faculty shortage continues in American universities and more foreign students pursue teaching careers in American business schools, their teaching effectiveness will inevitably become an issue that any business school must face. Despite the fact that they teach different disciplines, our interviewees found the common administrative mental-

ity is that they are expected to be able to teach with no difficulty. Albeit subtle, they expressed frustration with the lack of support. Therefore, future research should examine the types of emotional outcomes that may result from their teaching experiences, and more importantly, what impacts they may have on the other areas of their job performance, such as research productivity, service effectiveness, and overall job satisfaction. It will be fruitful to identify the type of supports that administration can offer to make it smooth transitions for foreign-born faculty members.

In this study, FBP’s self reference criterion with regard to their own education experiences in home country seem to have an impact on the problems they face. But we would also suggest future researchers examine the interactions between a professor’s native educational culture and his/her personal social styles on teaching effectiveness. For example, although both graduating from the same educational system in a foreign culture, someone who is naturally expressive and amiable will have an easier time adapting to American classrooms that values interaction and discussion.

This study represents the first step toward understanding the FBP’s teaching experiences in the American business classroom. As an exploratory research, we examined issues that are common to FBP in various business disciplines. As marketing faculty, we are also particularly interested in identifying any unique challenges facing foreign born marketing professors. For instance, we assume the effect of understanding mainstream culture on teaching varies across different disciplines. More specifically, we suspect that faculty teaching the technical aspect of information systems and those teaching economics theories may feel the least relevance between the American pop culture and the subject matters they teach. While those teaching more application-based courses, might find culture to have a greater effect. However, the data of this study is insufficient to allow for close examination of this matter. To provide more insights for foreign born marketing professors in particular, future research should gather more data from FBPs of different stages of their professional careers and examine if and how the perception of challenges in teaching may vary. Especially, we think comparisons between foreign born master teachers and rookies would prove most instructive for all FBP marketing faculty. Comparisons between native born and FBP marketing professors may also help reveal unique challenges faced by FBPs.

Finally, Hofstede’s model of cultural dimensions can be useful in future studies to formulate specific hypotheses regarding how culture may affect FBP’s expectations about American students, types of teaching methods used in classrooms, and interactions between faculty and students, etc. A larger scale data collection with quantitative data analysis may be needed for hypothesis testing.

## REFERENCES

- AACSB International (2007), "2006–2007 Business School Questionnaire," [http://www.aacsb.edu/knowledgeservices].
- Aram, John (1994), "Expectations and Adaptations in Cross-Cultural Education: An American-Style MBA Program in Spain," *The International Journal of Organizational Analysis*, 2 (4), 418–32.
- Clarke III, Irvine and Theresa Flaherty (2003), "Challenges and Solutions for Marketing Educators Teaching in Newly Emerging Markets," *Journal of Marketing Education*, 25 (2), 118–29.
- Dao, Tam K., Donghyuck Lee, and Huang L. Chang (2007), "Acculturation Level, Perceived English Fluency, Perceived Social Support and Depression among Taiwanese International Students," *College Student Journal*, 41 (2), 287–95.
- Fleisher, Belton, Masanori Hashimoto, and Bruce A. Weinberg (2002), "Foreign GTAs Can be Effective Teachers of Economics," *Journal of Economic Education*, 33 (4), 299–325.
- Hayes, R.L. and H.R. Lin (1994), "Coming to America: Developing Social Support Systems for International Students," *Journal of Multicultural Counseling and Development*, 22, 7–16.
- Hofstede, Geert (1980), "Motivation, Leadership, and Organization: Do American Theories Apply Abroad?" *Organizational Dynamics*, (Summer), 42–63.
- Lindahl, Frederick and Russell Fanelli (2002), "Apply Continuous Improvement to Teaching in Another Culture," *Journal of Accounting Education*, 20 (4), 285–95.
- Manrique, Cecilia G. and Gabriel G. Manrique (1999), *The Multicultural or Immigrant Faculty in American Society*. Lewiston, NY: The Edwin Mellen Press.
- Marvasti, Akbar (2005), "U.S. Academic Institutions and Perceived Effectiveness of Foreign-Born Faculty," *Journal of Economic Issues*, 39 (1), 151–76.
- Miles, Matthew B. and A. Michael Huberman (1994), *Qualitative Data Analysis: An Expanded Sourcebook*, 2<sup>nd</sup> ed. Thousand Oaks, CA: Sage.
- Rubin, Herbert J. and Irene S. Rubin (2005), *Qualitative Interviewing: The Art of Hearing Data*, 2<sup>nd</sup> ed. Thousand Oaks, CA: Sage.
- Rodrigues, Carl (2005), "Culture as a Determinant of the Importance Level Business Students Place on Ten Teaching/Learning Techniques: A Survey of University Students," *Journal of Management Development*, 24 (7), 608–21.
- Strauss, Anselm and Juliet Corbin (1998), *Basics of Qualitative Research: Techniques and Procedures for Developing Grounded Theory*, 2<sup>nd</sup> ed. Thousand Oaks, CA: Sage.
- Tompson, Holly B. and George H. Tompson (1996), "Confronting Diversity Issues in the Classroom With Strategies to Improve Satisfaction and Retention of International Students," *Journal of Education for Business*, 72 (1), 53–57.
- Ulrich, Thomas (2005), "The Relationship of Business Majors to Pedagogical Strategies," *Journal of Education for Business*, (May/June), 269–74.
- Usunier, Jean-Claude and Julie Anne Lee (2005), *Marketing Across Cultures*, 4<sup>th</sup> ed. Harlow, England: Prentice-Hall.
- Yeh, C.J. and M. Insoe (2003), "International Students' Reported English Fluency, Social Support Satisfaction, and Social Connectedness as Predictors of Acculturative Stress," *Counseling Psychology Quarterly*, 16, 15–28.