I. BASIC COURSE INFORMATION

Course Dates: January 11th-15th, 2016
Location: WJW416
Breakout Rooms: M-F: WJW415, M 3:30-5:30PM; WJW311, F 12:30-2:30; WJW207

Instructor Information:
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E-mail: km2233@columbia.edu ; km@kmandcoinc.com
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2016 MBA Candidate
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Luxury Education Foundation:
Laura Cocchia
Assistant Program Manager
E-mail: laura@luxuryeducationfoundation.org

II. COURSE DESCRIPTION

The class "The Luxury Approach" addresses the unique properties, opportunities, and challenges of the luxury industry by studying issues relevant to the field in the various aspects of the business, from production and management to distribution and promotion. The course structure includes presentations (by faculty and industry executives), discussions, and the team project.

In this intense block week program, Columbia Business School MBA students will work in teams of 5-6 to solve an actual project created exclusively for this class by Rémy Cointreau USA – Louis XIII. Each of the teams will work on a specific aspect of the project, and the teams will coordinate their research and recommendations to present together to the company's executives at the last session of the program.

III. CLASS POLICIES

i. 24 student limit

ii. MBA and EMBA students

iii. **Attendance at all classes is MANDATORY** (see below for attendance policy and grading policies)

   a. Failure to attend class will impact your final grade. Please also note that unexcused tardiness will also impact your final grade.
   b. Attendance will be conducted approximately 15 minutes after the set time of each class. Students who are not present at the time of roll call will be counted as absent.
   c. Constructive participation in team activities and classroom discussions is expected from every student.
   d. Participation in marketing reviews and the final presentation is 100% mandatory. If you are ill, you must contact faculty prior to class and arrange for delivering your work to your team.
   e. Only one permanent grade will be given at the end of each semester. This grade will take into consideration your individual pre-semester research, your individual participation in the classroom and meetings, your attendance and personal input in the team’s project, as well as your team’s performance throughout the entire semester (please see details below).
IV. PRE-SEMESTER ASSIGNMENTS, DELIVERABLES AND TEAM SELECTIONS

i. Registered students must submit to Prof. Maisonrouge, Laura and the TA by Thursday, December 17th, 2016 at 9AM the following (if possible, please send them as soon as you are registered for the course):

a. Resume & best telephone # to reach you at

b. Project Preferences for Team Selection: each student must list the 4 teams in order of preference (please refer to the project and research descriptions by team below) making sure to make a note of:
   • Any relevant past experience
   • Specific skills relevant to the team assignments

c. Signed NDA document (available on Canvas)

d. Watch the video on the class:
   http://www.kaltura.com/index.php/extwidget/preview/partner_id/24852/uiconf_id/20954482/entry_id/1_y71eb07p/embed/iframe

ii. Team Assignments will be issued by Friday, December 18th at 5 PM

a. Please note that we cannot guarantee that all students will be assigned to their top two choices.

b. We encourage students to form their own teams – please notify us if you do.

iii. Team Conference Calls on Monday, December 21st from 9:30-10:50AM

a. Each team will join a conference call for 20 minutes from 9:30-10:50AM as follows (in order to discuss the research each student will be conducting and to answer any questions about it):
   • Team A: 9:30-9:50AM
   • Team B: 9:50-10:10AM
   • Team C: 10:10-10:30AM
   • Team D: 10:30-10:50AM

Please use the following US dial-in #: Dial-in: 1-712-832-8300, Access Code: 863771

iv. Individual Pre-Semester Research due by Wednesday, January 6th at 5PM

a. Extensive research must be completed and emailed to me, Cem and Laura prior to the first day of class. Please refer to the research guidelines and the full research descriptions each team and student must prepare. This individual research will account for 20% of your grade and it will be each team’s responsibility to organize itself to split up the research amongst each of its members in a fair manner so that each student has a even workload. As a team, the entire team’s research must be fully covered. This research consists of various mystery shopping observations and experiences, digital assessments and a write-up of your findings. Please refer to the detailed course description for further explanation on pre-work assignments. The write-up should be done in MS Word, Powerpoint, or PDF format. Please be sure that it is thorough and use of visuals is encouraged. Several examples of past individual research have been uploaded to Canvas to help guide you. Your research findings should focus on your perception on Louis XIII’s general retail/brand experience and any comparisons or differences that you may observe while visiting competitor brands for your respective team assignments.
v. **Team Research Presentations on Tuesday, January 12th:**

   a. Each team will be responsible for gathering all individual research and for presenting all their findings in a coherent PowerPoint presentation format (which will be formally presented on the second day of class, Tuesday, January 12th). Guidelines as well as past student research will be posted on Canvas for clarification on the requirements of the research assignments.

   b. This team presentation will count towards your in-class presentations to faculty portion of your grade accumulating to 20% of your final grade (please refer to the below Grading Guidelines for more information on the grade breakdown).

vi. **Resources and Readings**

   a. All readings are required to be completed prior to the first day of classes. This is to ensure that all students are fully prepared and can focus on the demanding work that the project will require during the week of classes. Please see below for the list of mandatory and suggested readings.

   b. **Mandatory Readings**

      - Course Book: articles will be uploaded and can be accessed via the course’s Canvas page

   c. **Suggested Readings**

      - *The Luxury Alchemist*; Ketty Pucci-Sisti Maisonrouge
      - *The Bling Dynasty: Why the Reign of Chinese Luxury Shoppers Has Only Just Begun*; Erwan Rambourg
      - *Luxury Online: Styles, Systems, Strategies*; Uche Okonkwo
      - *Putting the Luxe Back in Luxury: How New Consumer Values are Redefining the Way we Market Luxury*; Pamela Danziger
      - *Luxury Brand Management: A World of Privilege*; Michel Chevalier and Gerald Mazzalovo
      - *Luxury World: The Past, Present and Future of Luxury Brands*; Mark Tungate
      - *Deluxe: How Luxury Lost its Luster*; Dana Thomas
      - *Let Them Eat Cake: Marketing Luxury to the Masses- as well as the Classes*; Pamela Danziger
      - *Trading up: Why Consumers Want New Luxury Goods*; Michael Silverstein and Neil Fiske
      - *The Cult of the Luxury Brand: Inside Asia’s Love Affair with Luxury*; Radha Chadha and Paul Husband
      - *Knockoff: the Deadly Trade in Counterfeit Goods*; Tim Phillips
      - *Priceless: Turning Ordinary Products into Extraordinary Experiences*; Diana LaSalle and Terry Britton
      - *Why People Buy Things They Don’t Need: Understanding and Predicting Consumer Behavior*; Pamela Danziger
      - *Luxury Fever: Why Money Fails to satisfy in an Era of Excess*; Robert Frank
      - *Buzzmarketing: Get People to Talk About Your Stuff*; Mark Hughes
v. **GRADING**

<table>
<thead>
<tr>
<th>% OF FINAL GRADE</th>
<th>ASSESSMENT</th>
<th>GRADE DESIGNATION</th>
<th>ADDITIONAL INFORMATION AND GRADE DROP POLICIES</th>
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<tbody>
<tr>
<td>20%</td>
<td>Pre-Research</td>
<td>C – Individual</td>
<td>To be completed by the first day of classes: Monday, January 11th.</td>
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<tr>
<td></td>
<td>Class Participation and Attendance</td>
<td>C – Individual</td>
<td>If a student misses two (2) sessions (classes or meetings), the student’s grade will automatically be lowered by one (1) full grade (e.g., H to HP, HP to P, P to LP, LP to fail). If a student misses three (3) sessions, their grade will be lowered by two (2) full grades. Moreover, if a student misses four (4) or more sessions, they will fail the class.</td>
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<tr>
<td>20%</td>
<td>Peer Evaluations from Team Members</td>
<td>C – Individual</td>
<td>Each student will evaluate each member on their team based on a 100 point scale. The TAs will email you a form to complete at the end of the week.</td>
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<td></td>
<td>Presentations to Faculty during In-Class Debriefings and Reviews (Individual &amp; Group)</td>
<td>A – Group</td>
<td>Students will present a few times during the week to faculty and to the company’s executives.</td>
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<tr>
<td>20%</td>
<td>Final Presentations (Individual &amp; Group)</td>
<td>A – Group</td>
<td>Students will present their final recommendations at the end of the week.</td>
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vi. **OBJECTIVES**

The word “luxury” seems to be used for everything nowadays, and this phenomenon reflects the increased attraction for what the luxury industry represents in the minds of the public: the ultimate sign of personal success, the fulfillment of individual dreams but, in the current challenging economic environment, it is also sometimes perceived as the inappropriate display of financial disparities. So what are the challenges inherent to this industry? Historically driven by inspiration and sometimes guesswork, it is now regarded as a distinct product field that requires specific skills. This class addresses the idiosyncrasies of the luxury industry by studying issues relevant to the field in the various aspects of the business, from production and management to distribution and promotion.

The objectives of the course are:
- To identify, analyze and manage the issues specific to the luxury industry
- To use your previous marketing knowledge and apply it to this specific industry and project
- To sharpen your presentation skills in front of the participating company’s senior executives
- To learn how to work efficiently in teams under tight time constraints
- To take advantage of the unique opportunity to work on a real project that the participating luxury company, in this case Louis XIII by Remy Martin, is currently addressing, to interact with the senior executives of this world-renowned firm, and to understand from their feedback what makes a good solution to the issue at hand.

vii. **COURSE CONTENTS**

In this intense block week program, MBA students from Columbia Business School work in teams of 5 to 6 students to solve an actual project created exclusively for this class by the participating company, (Rémy Cointreau – Louis XIII for January 2016). Each team will work on a specific aspect of the project, and the teams will coordinate their research and recommendations to present to the company’s executives during the company meetings and at the last session of the program.

**Classroom activities are broken down into 4 parts:**
1. Presentations and discussions focusing on luxury startups and case studies
2. Review of teamwork on the companies’ projects
3. Preparation for Presentations to the Company
4. Guest Speakers, CEOs and other luxury specialists will share their views on specific issues of the luxury industry, such as counterfeiting, the challenges of the luxury market in China, etc. and their companies. Some of this year's (tentative) guest speakers are:
   o Robert Chavez, President & CEO, Hermès of Paris, Inc.
   o François Kress, President & CEO, Carolina Herrera
   o Pamela Baxter, President & CEO, Dior & LVMH Perfumes and Cosmetics
   o Alain Bernard, President & CEO, Van Cleef & Arpels
   o Melody Lee, Director of Brand Strategy & Planning, Cadillac
   o David Friedman, President & CEO, Wealth-X

Class debriefings provide the opportunity for each team to share their findings, get feedback from class, and ensure that all students have the same overall vision for the project.

The students will meet four times with the company’s Senior Management (see tentative class schedule). These meetings will take place at Columbia Business School. These meetings are mandatory for all students, and this additional requirement must be taken into consideration when signing up for this class.

Please see below for details on the Company Project and the required research to be done prior to the Block Week.

PROGRAM
“The Luxury Approach” is a hands-on class that enables students to understand what makes the luxury industry different from other industries. Through the project that the class will jointly work on, students will use their knowledge and skills in the specific context of the submitted project.

Students need to be ready to work in teams outside of the classroom, PRIOR TO AND DURING the Block Week, in order to answer this real project for one of the world’s most reputable luxury firms. The standards are very high, both in terms of content research as well as presentation. In the world of luxury, it is essential to realize that every single detail can derail an entire project.

The presentations to the participating company will be made on a PowerPoint format. Luxury companies are driven by design, and aesthetics must be taken into consideration at every level of the company, both internally and when communicating with customers.

Please see detailed outline for the deliverables both in terms of research and recommendations, and how the student teams will work on each part. Before the class, students are to send me their preference for each team option, describing possible contribution and perspective on each team's specific part of the project, including relevant experience, specific skills, such as financial, analytical, marketing research, design and other professional or academic assets/talents (see Course Requirements). Students are also asked to send a current resume, and rank the teams' topics in order of preferences, clearly identifying their selection. With this information, I'll assign students to the various teams, taking into account both students' preferences and necessary skills for each team. Students are encouraged to form their own team if they wish. Team selection will be confirmed by mid-December.

Given the fast pace and condensed timeframe of the class, all research must be completed prior to the first class: details of this research are included in the description of each team's tasks (see below). As a special requirement, all reading is also expected to be complete prior to the first class, so that students are fully prepared and can focus on the demanding work that the project will require during the week of class. This preparation is expected of each student individually. Once the class starts, most of the work will be done in teams, so it is essential that each student come fully prepared in order to best contribute to the team efforts on the company project.

Each project submitted is different so there are no frameworks that can be handed out ahead of time. The deliverables for the project include:
   - All research and recommendations presented to the executives in Electronic format
   - Final presentation on PowerPoint that will cover all aspects of the project
In order to work on your project, the company will share with the class sensitive information critical to the success of the case study. A confidentiality agreement has been approved by the school’s legal counsel: faculty and students registered in the class are required to sign it. You will be asked to review it carefully, sign it and email it back prior to the first class.

Finally, I would like to emphasize all the time, energy, expertise and coordination that go into this course, as well as the personal commitment of the senior executives of the participating company: I expect in return your full dedication to this class. Faculty will be at hand to guide you through the process during the entire week. This class requires a lot of work, it will be frustrating at times, but I also know that the students who took this class in the past felt it was one of the highlights of their MBA experience, and I really hope that you too will have a fascinating experience.
COMPANY PROJECT: LOUIS XIII
CASE STUDY DESCRIPTION

1) PROJECT OVERVIEW:

The goal of this project is to develop an impactful strategy as well as mechanisms for Louis XIII by Rémy Martin, On and Off-Trade (meaning On Trade: Product is purchased and consumed at the point of purchase - Bar, Restaurant, night-club etc., and Off-Trade: Product is purchased at a retail outlet for home consumption - e.g. Astor Wines, etc.).

2) COMPANY PROFILE

LOUIS XIII by Rémy Martin, the “King of Cognacs,” is the leader of the ultra-premium cognac segment.

LOUIS XIII is ultra-premium, exclusive, rare, precious, exceptional, celebratory, and timeless. It is a brand that is desired by many, accessible by few.

Each decanter has a suggested retail price of $3,100. LOUIS XIII is a rare luxury spirit that is unmatched in the spirits category, providing consumers with a level of craftsmanship that is unparalleled. The undisputed King of Spirits - #1 best-selling luxury priced spirit in the world and the king of the back bar in every prestigious account in the world.

Exceptional Product
Product Promise: « One century in a bottle »
Blended from 1,200 eaux-de-vie and aged up to 100 years in one-of-a-kind, century-old tierçon barrels, LOUIS XIII is “One Century in a Bottle,” providing consumers with a level of craftsmanship that is unmatched. The blend of grapes is harvested only from the finest Cru Grande Champagne (100%), and four generations of Cellar Masters have carefully selected, evaluated, and cultivated each of the eaux-de-vie.

Tasting provides an array of over 200 aromas and flavors, with a finish of one hour on the palate. The spirit is delicate, refined, and complex, and truly the “Most Prestigious Spirit in the World.”

The iconic crystal decanter is individually numbered and handcrafted by 11 master glass men. Like a piece of jewelry, each decanter is unique, and is a genuine work of art.

Cultural Icon
Created in 1874, LOUIS XIII is supported by 140 years of history. It has been celebrated all over the world by royals, dignitaries, and celebrities. LOUIS XIII has been served at all European Royal Courts, travelled across Europe onboard the Orient Express, and took flight with the Concord. LOUIS XIII has been the choice of notables such as Charlie Chaplin, Winston Churchill, Charles de Gaulle and, in the modern days, by Robert de Niro, Quentin Tarantino, Jamie Fox, Carmelo Anthony and many others.

Beginning in 2012, LOUIS XIII has established a link to cinema and the world of Hollywood through sponsorship, PR and private events. Program activation includes: partnership with the Critics’ Choice Movie & TV Awards for the LOUIS XIII Genius Award, sponsorship with Martin Scorsese’s The Film Foundation (3 talks with LOUIS XIII have been organized with celebrities and media).

Brand Communication Platform
One Century in a bottle.
Each decanter takes 4 generations of cellar masters over 100 years to craft.
A blend of up to 1,200 eaux-de-vie, the youngest of which is at least 40 years old.
Note that we do not expect the strategy and the ideas to build off of the communication platform.
Strategic Product Launch
LOUIS XIII has had a number of special edition limited releases, each heightening the brand’s sense of rarity: Black Pearl in 2007 (SRP $7,500), Black Pearl Magnum in 2008 (SRP $33,000), Rare Cask 43, 8 in 2010 (SRP $15,000), and the recent Rare Cask 42,6 (SRP $22,000). Additionally a 3 liter decanter - “Le Jeroboam” - was auctioned for charity in 2011 and is available since then worldwide in very limited quantities yearly for an SRP of $28,000. The next limited edition release will celebrate the 140th anniversary of the brand.

More information can be found on our website http://www.louisxiii-cognac.com/agegate

Target Consumer
• Accomplished, wealthy men, 35+ years old
• Cognac and wine connoisseurs and collectors; appreciate the detail and craft of true luxury and/or prestigious fine wine
• HNWI; $500K+ HHI, Millionaire in Liquid Assets
• Finance, Executives, Hollywood Moguls, High Rollers, Professional Athletes
• Reside in cosmopolitan city centers and affluent suburbs

Major Cognac Competitors:
1. Hennessy Paradis and Paradis Imperial
2. L’Esprit Courvoisier
3. Martell l’Or Cognac
4. Camus

Major Non-Cognac Competitors:
Wines
1. Chateau d’Yquem
2. Chateau Lafite Rothschild
3. Dom Pérignon
4. Chateau Latour Pauillac
5. Chateau Petrus Pomerol
6. Chateau Cheval Blanc
7. Sotheby’s Wine Collection

Spirits
1. Chivas Regal Royal Salute
2. The John Walker Rare Blended Scotch in Crystal Decanter
4. Macallan M

Louis XIII Points of Sale – NY Metro Area
Manhattan:
1. Morrell Wine Co, 1 Rockefeller Plaza
2. Crush Wine & Spirits, 153 E 57th St, New York, NY 10022
3. Del Frisco’s Double Eagle Steakhouse, 1221 6th Ave, New York, NY 10020
4. Mari Vanna, 41 East 20th Street
5. Baccarat Hotel, 28 W 53rd St, New York, NY 10019

West Chester:
1. Varmax Liquor Pantry, 16 Putnam Ave, Port Chester, NY 10573
2. Zachy’s Wines, 16 East Pkwy, Scarsdale, NY 10583

New Jersey:
1. The Wine Library, 586 Morris Ave, Springfield Township, NJ 07081
2. Wine Legend, 277 Eisenhower Pkwy, Livingston, NJ 07039
3) THE CASE STUDY

a) Project Objective:

To this day, and while being aesthetically pleasing, our merchandising strategy has consisted of On and Off-Premise displays, which have struggled to fully unlock our opportunity:

- They made our product look good but were not necessarily useful to our retail partners to sell more.
- They put the brand on a pedestal but somehow made it intimidating to shop the product.
- They lacked space to include details and information about our product and our brand.
- They didn’t tell a story, reference an occasion or inspire consumption (how or when to consume the product).

Louis XIII’s ultimate goal is to provide unique experiences to consumers that in turn provide education and evoke emotion with a focus on the in-store and in-bar portion of the path to purchase.

The goal of this project is to develop an impactful strategy as well as mechanisms for Louis XIII by Rémy Martin, On and Off-Trade (meaning On Trade: Product is purchased and consumed at the point of purchase (Bar, Restaurant, night-club etc.) and Off-Trade: Product is purchased at a retail outlet for home consumption (e.g. Astor Wines, etc.).

Ultimately, we would like the tactical initiatives at the point of purchase to deliver the following:

- **Message:**
  - Translate the vision of the brand: bring to life the story of Louis XIII in new and unique ways. Tell a story that’s engaging and inspiring.
  - Communicate key functional messages that will demonstrate Louis XIII has the highest level of craftsmanship and is appropriate for consumption.
  - Note that we are not looking for a communication campaign idea nor a strategy that builds upon the Creative Genius platform (our current communication platform). The strategy and tactics we are looking for should be commercially-driven, high-level and live on their own for a long period of time. We will provide brand assets and guidelines during the briefing meeting.
- **Tone:**
  - Immerse consumers into a sophisticated and luxurious experience consistent with their lifestyle and their aspirations.
- **Effectiveness:**
  - Increase visibility and velocity for the products and noticeably increases sales.
- **Engagement:**
  - Engage the retail partners and their teams (clerks, bartenders…) around the brand and give them reasons to make space for our POS and to recommend Louis XIII to their customers.
  - Be interactive and potentially generate consumer-to-consumer referral/recommendation (through social media).
- In addition, we would like the off-premise display ideas to offer an option to sell the full range of Rémy Martin products around them (VSOP, V, 1738, XO).
- As long as they are focused on creating consideration, engagement and conversion in the point of purchase, the strategies and tactics can be physical and/or digital.

a) Project Expectations:

All required research is to be completed prior to the first class (Monday, January 11th at 8 am) and compiled in a PowerPoint Presentation that will be presented to the executives on the second day of the Block Week. Pre-work involves store visits, specific reading, etc. Class Debriefings provide the opportunity for each team to share their findings, get feedback from faculty, and ensure that all students share the same overall vision for the project.

**Team Assignments:**

Students will be split into 4 teams (maximum 6 students per team): each team will be responsible for specific factions of the research:
<table>
<thead>
<tr>
<th>Team:</th>
<th>Research:</th>
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<tbody>
<tr>
<td>A</td>
<td>Louis XIII Brand and Service Experience; On and Off Trade</td>
</tr>
<tr>
<td>B</td>
<td>Competitive Analysis – Direct Competitor Brands and Service Experiences; On and Off Trade</td>
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<tr>
<td>C</td>
<td>Competitive Analysis – Brands who offer unique customer experiences through innovative in-store tech platforms</td>
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<tr>
<td>D</td>
<td>Competitive Analysis – Brands who share stories through innovative consumer experiences</td>
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b) Students Should Consider
   • The brand’s ultimate goal is to provide unique experiences to consumers that in turn provide education and evoke emotion with a focus on the in-store and in-bar portion of the path to purchase.
   • Students should evaluate and apply key learnings from other industries. Tap the LEF network to learn about luxury shoppers, best practices and recent innovations across categories like fashion, cosmetics, jewelry/watches, department stores.

c) Requirements & Deliverables
   • We are looking for a retail and on-premise strategy that includes:
     o Key insights into our brand, our shopper, our competitors, our retail environment, and innovation in luxury merchandising as well as the implications of these findings for our brand and our business (i.e. challenges and opportunities)
     o An effective point of purchase strategy for Louis XIII with a set of key guidelines for the brand on and off-premise
     o Examples of tactics to activate around the strategy (initial direction with options for further development)
   • We recommend the strategy and tactics to be informed by research. Research may include:
     o Mystery shopping
     o Consumer research
     o Understanding of direct competitors
     o Research into merchandising strategies and tactics across luxury categories (other than beverage alcohol) – what are innovative ways luxury brands and parallel industries shared their stories on and off line?
   • Please focus the deliverables on the “first moment of truth” (when shoppers and drinkers are already in the store/bar).
   • **Please note:**
     o Brand assets will be shared during kick-off.
     o We will give you access to key internal stakeholders and brand ambassadors in the markets should you want to interview them and learn about our brand and how they define the challenge.

d) Measurement & Evaluation
   • Note that Rémy Cointreau will test the strategy and tactical initiatives with a small panel of brand ambassadors, distributors and retail partners before further development. We will test the ideas with this panel to find out:
o Does the panel understand why they would need to implement this strategy and use these tools? Is it unique and different? Is it at the level of luxury they expect from our brand? Is it easy to set up? Do they believe the mechanism presents opportunities to impact their bottom line?

e) Company Contacts:
Timothee Memmi, Director of Planning & Innovation
David Dankenbrink, VP of HR

ALL TEAMS/STUDENTS PRE-WORK (to be conducted before start of Block Week):
1. Attend the Louis XIII Brand Education Workshop on Tuesday, 12/8 from 1:00-2:00PM in Warren 207
2. Visit at least 2 points of sale for Louis XIII – 1 must be on trade and 1 must be off trade
   a. Fill out a mystery shopping chart for each visit. Please submit them as part of your individual research and send them to Team A (see mystery shopping guidelines)
3. Visit the Louis XIII website and all social media platforms/web pages
   a. Fill out a digital platform assessment, Please submit it as part of your individual research and send it to Team A (see digital assessment guidelines)
4. While visiting the points of sale for Louis XIII, please review merchandising of direct competitors above at both on trade and off trade points of sale

TEAM PRE-WORK (to be conducted before start of Block Week) in addition to the above pre-work:

a) Team A: Louis XIII Brand and Service Experience; On and Off Trade
1. Interviews:
   a. Interview Timothee Memmi, Director of Planning & Pierre Bollet, US Brand Manager
   b. Interview RC Executive(s): Mark Breene (CMO), David Dankenbrink (SVP, HR), Yves Delaunay (Brand VP)
   c. Sales representatives at specialty retailers and bartenders where Louis XIII is sold (see sales rep question guidelines)

2. Mystery Shopping: Each student must conduct 4 Louis XIII mystery shopping visits (see mystery shopping guidelines)
   a. Fill out a mystery shopping chart for each visit and submit them as part of your individual research
   b. 2 visits must be at on trade points of sale and 2 visits must be at off trade points of sale
      i. 1 off trade visit must be at the West Chester or NJ location

   During your visits:
      i. Engage in discussions with staff and personnel as much as possible
      ii. Note the interaction of the staff with technology and/or digital platforms
      iii. Note the customer experience and merchandising strategy. Consider: how is it differentiated? Is it interactive? Does it pay homage to the brand or tell a story? What audience does it appeal to and how? Does it evoke emotion? Leave a lasting impression?

3. Explore Louis XIII’s Online/PR presence
   a. Website
   b. Social Media Platforms
   c. Online Magazines, blogs, videos, events, PR initiatives or partnerships, etc.
   d. Fill out a digital platform assessment chart and submit it as part of your individual research

4. In addition to merchandising and PR strategies, analyze the following components of the brand:
   a. Price Positioning
   b. Brand Image Positioning
   c. Communications & Advertising
   d. Digital Strategy
   e. Customer Relations Management
5. **Brand Report:** Team A must gather all other students’ mystery shopping reports and digital assessments (for Louis XIII ONLY) and make a concise, cohesive presentation on findings for the company. What are Louis XIII’s areas of strengths and areas of opportunity?

b) **Team B: Competitive Analysis – Direct Competitor Brands and Service Experiences: On and Off Trade**

1. Send your Louis XIII mystery shopping and digital assessment reports to Team A by **Wednesday, January 6 at 5PM**

2. **Mystery Shopping:** Each student should conduct 2 mystery shopping visits at least 2 of the listed competitors below: between the students on Team B, all brands mentioned below must be covered.
   i. Fill out a mystery shopping chart for each visit and submit it as part of your individual research (see mystery shopping guidelines)
   ii. 1 visit should be at an off trade point of sale and 1 visit should be at an on trade point of sale
   iii. Each student should be responsible for at least 2 different brands each so all competitors are properly assessed.

   1. **Major Cognac Competitors:**
      1. Hennessy Paradis and Paradis Imperial
      2. L'Esprit Courvoisier
      3. Martell l'Or Cognac
      4. Camus

   2. **Major Non-Cognac Competitors:**
      Wines
      1. Chateau d’Yquem
      2. Chateau Lafite Rothschild
      3. Dom Pérignon
      4. Chateau Latour Pauillac
      5. Chateau Petrus Pomerol
      6. Chateau Cheval Blanc
      7. Sotheby’s Wine Collection
      Spirits
      1. Chivas Regal Royal Salute
      2. The John Walker Rare Blended Scotch in Crystal Decanter
      4. Macallan M

*Note 1: Louis XIII’s price point is particularly high, look for brands and products inside the store/bar with the highest price point (including fine wine)*

*Note 2: Focus on ultra-premium/luxury accounts on and off-trade.*

**During your visits:**
   a. Engage in discussions with staff and personnel as much as possible
   b. Note the interaction of the staff with technology and/or digital platforms
   c. Note the customer experience and merchandising strategy. Consider: how is it differentiated? Is it interactive? Does it pay homage to the brand or tell a story? What audience does it appeal to and how? Does it evoke emotion? Leave a lasting impression?

3. **Explore the overall Online/PR presence of your chosen competitors:**
   i. Website
   ii. Social Media Platforms
   iii. Online Magazines, blogs, videos, events, PR initiatives or partnerships, etc.
      1. Please study the Hennessy 250 tour and Atelier Dom Pérignon
iv. Fill out digital platform assessment charts and submit them as part of your individual research

4. **In addition to merchandising and PR strategies, analyze the following components of the brands:**
   i. Price Positioning
   ii. Brand Image Positioning
   iii. Communications & Advertising
   iv. Digital Strategy
   v. Customer Relations Management

5. **Competitive Brand Positioning Maps:** Create competitive positioning maps that focus on in-store strategy and customer service for on and off trade points of sale. Students are encouraged to create additional/multiple positioning maps based on relevant findings from research.
   i. Where can Louis XIII capitalize based on its competitors’ strengths and weaknesses?
   ii. Where is Louis XIII positioned amongst its competitors?

c) **Team C: Competitive Analysis – Brands who offer unique customer experiences through innovative in-store tech platforms**

1. Send your Louis XIII mystery shopping and digital assessment reports to Team A by **Wednesday, January 6 at 5PM**

2. **Mystery Shopping:** Each student must conduct at least 2 mystery shopping visits and assess at least 1 or 2 of the listed apps and/or e-commerce platforms: between the students on Team C, all brands mentioned below must be covered
   a. Fill out a mystery shopping chart for each visit as well as a digital platform assessment chart for each app/platform and submit them as part of your individual research (see mystery shopping & digital assessment guidelines)
   b. Each student should be responsible for at least 2 different brands each (1 In-Store & 1 Web) so all brands are properly assessed.

   iii. **In-Store Digital Experience:**
   1. Burberry
   2. Gucci
   3. Nordstrom
   4. Rebecca Minkoff (interactive mirrors)
   5. Trunk Club
   6. Tommy Hilfiger (virtual reality headsets)
   7. Any other in-store technology that shares the brand story and engages customers

   iv. **Social/Web Digital Experience:**
   1. Apple Store App
   2. Cartier Fine Watch Making App
   3. Hermès: 225 Liberty App, (using it at Hermès Brookfield Place Parfumerie)
   4. Neiman Marcus: Website & Apps, Memory Mirror
   5. Net-A-Porter Website & Net Set App
   6. Starbucks & Redbox Apps
   7. Holographic Displays (Polo Ralph Lauren SP15 Show, Burberry Beijing Flagship, Intel Technology)
   8. Any other social/web digital that encourages customers to visit in-store and enriches customer’s experiences

   During your in-store visits:
   a. Engage in discussions with staff and personnel as much as possible
   b. Note the interaction of the staff with technology and/or digital platforms
   c. Note the customer experience & merchandising strategy. Consider: how is it differentiated? Is it interactive? Does it pay homage to the brand or tell a story? What audience does it appeal to and how? Does it evoke emotion? Leave a lasting impression?

   When exploring E-Commerce Platforms, Websites & Apps:
a. Critically assess the digital promotion strategies. Consider: how can these innovative ways of engaging consumers translate to Louis XIII’s brand interaction at the point of sale? How do they elevate the consumer experience and tell a story? Inspire purchases and sales? How can Louis XIII enhance the on & off trade retail experience through social or digital strategies?

3. Explore the overall Online/PR presence of your chosen brands (where applicable):
   a. Website/E-Commerce Platforms
      Note creative aesthetics, cross-channel strategies, client and consumer engagement
   b. Social Media Platforms
   c. Online Magazines, blogs, videos, events, PR initiatives or partnerships, etc.
   d. Review the following article on successful mobile retail apps:

4. Digital Strategy: Using your research on digitally savvy luxury stores, websites and apps, develop creative tech concepts & merchandising strategies that Louis XIII can use to in-store and in-bar to inspire consumption. These ideas could be in the form of a new app proposal, social media or digital campaign that can be utilized at & off trade points of sale. Please note – digital/app suggestions should be focused on in-store initiatives at the point of purchase, not on broader communications/branding strategies.

   d) Team D: Competitive Analysis – Brands who share stories through innovative consumer experiences

   1. Send your Louis XIII mystery shopping and digital assessment reports to Team A by Wednesday, January 6 at 5PM

   2. Mystery Experiences: Each student must conduct at least 2 mystery experience visits: between the students on Team D, all brands / experiences mentioned below must be covered. The team is welcome to add other exhibition/experiences they have attended that enhances the brand’s story
      i. Fill out a mystery experience chart for each visit and submit it as part of your individual research (see mystery experience guidelines)
   e. Each student should be responsible for at least 2 different brands each (1 Experiential and 1 Exhibit) so all brands are properly assessed.
      i. Experiential Brands
         1. Eataly NYC
         2. Le District at Brookfield Place
         3. Nike
         4. Tesla (NYC Dealership)
         5. The Four Seasons Hotel
         6. Genes at Co-op Café
      ii. Recent Pop-up Shops / Exhibits / Partnerships
         1. Dior Mount Street Pop up Shop
         2. Hermès pop-up shops in NY and elsewhere
         3. DISown http://www.papermag.com/2014/03/disown_art_show.php
         5. Story (located in Chelsea)
         6. Refinery 29 – 29Rooms Exhibition
         7. Connected Food Labels (Thinfilm Electronics & Ferngrove Wine Group)
         8. Lowline Space

   During your visits:
   a. Engage in discussions with staff and personnel as much as possible
   b. Note the interaction of the staff with technology and/or digital platforms
c. Note the customer experience. Consider:
how is it differentiated? Is it interactive? Does it pay homage to the brand or tell a story? What audience does it appeal to and how? Does it evoke emotion? Leave a lasting impression?

*When exploring Pop-ups, Exhibits and Partnerships:*

a. Critically assess the promotion and engagement strategies as well as any striking merchandising techniques. Consider: how can these innovative ways of engaging consumers translate to Louis XIII’s brand engagement in-store/in-bar? How do they elevate the consumer experience and tell a story? Inspire purchases and sales? How can Louis XIII enhance the on & off trade experience through merchandising strategies?

3. **Explore the Online presence of your chosen brands (where applicable):**
   a. Website
   b. Social Media Platforms
   c. Online Magazines, blogs, videos, events, PR initiatives or partnerships, etc.
   d. Fill out a digital platform assessment chart and submit it as part of your individual research

4. **In-Store / In-Bar Strategy:** Using your research on dynamic experiential brands, develop a creative strategy that Louis XIII can use to educate its consumers on its heritage and craftsmanship in an exciting way, interactively tell a story about the brand and inspire consumption in-store and in-bar. These ideas could be in the form of new, innovative merchandising techniques to enhance the consumer experience, a striking exhibition, collaboration, event series, and/or an innovative pop up shop that can be utilized for on & off trade points of sale and supported digitally and socially.