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# Quantitative and Financial Techniques applied to Marketing

Professor: Roger Pagà and Luz Parrondo

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Office hours: by appointment

Course Type: Compulsory

Credits: 3 ECTS

Term: 1<sup>st</sup> Term

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## Course Description

The present course is divided in two separate blocks. The first block revolves around data analysis and will present students with several statistical techniques commonly used in quantitative market research. The second block of the course revolves around accounting and finance and will present students with an introduction to the main concepts related to managerial accounting, cost accounting and budgeting.

## Objectives

The main goal of the data analysis block is to provide students with a body of theoretical and practical knowledge that allows them to:

- 1) Obtain relevant descriptive statistics and charts from a dataset, and understand how to interpret them.
- 2) Understand which 'dependence' statistical techniques are better suited to analyse a dataset, how to perform them, and how to interpret the results.

The accounting and finance block of the course will allow the student to identify the measures to take in connection with company analysis and financial decision-making, and other decisions that can improve the performance of a firm. Students will have a better understanding of the working capital management and cost accounting as a key factor of the firm's financial strength. Finally, we introduce marketing budgeting as an essential tool for decision making.

## Methodology

The data analysis block of the course will follow a 'learning by doing' approach. In each session, the professor will present students with a dataset that will serve to illustrate the advantages and scope of a particular statistical technique. Then, the professor will show

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Note: This document is for informational purposes only. Course contents and faculty may change.

students how to analyze those datasets using software. Students will be performing the same analyses as the professor on their computers, familiarizing themselves with the process. Then, the professor will show students how to interpret the output of those analyses and what practical conclusions can be drawn from them. The goal is that by the end of the course students can autonomously analyze and interpret similar datasets as those seen in the course.

In the accounting and finance block of the course, the professor will use lectures to introduce the key materials, and class discussions to encourage students to share their understanding of these materials. Students will use worksheets and mini-case studies to gain practical experience of the key points. They will read relevant contemporary articles before class, to link the theoretical topics discussed to current events.

### Evaluation criteria

For the data analysis block of the course, which accounts for **50%** of the course's final grade, the evaluation items and their weights are as follows:

- In-group assignments involving the analysis and interpretation of datasets: 30%
- Class participation: 10%
- Final exam: 60%

For the accounting and finance block of the course, which accounts for **50%** of the course's final grade, the evaluation items and their weights are as follows:

- Cases and exercises: 30%
- Class participation: 10%
- Final project: 60%

### Important:

In courses that feature a final exam, a minimum grade of **4 out of 10** in the final exam is necessary for the other evaluation criteria to be taken into account when computing the student's overall grade for the course. Therefore, students who obtain less than a 4 out of 10 in the final exam will fail the course automatically. Those students will have to take a remedial exam (more details below).

Courses in the Program will generally include group assignments (case studies, projects etc.). At the end of each term, and in order to disincentivize free-riding behaviors, students will have the opportunity to evaluate the involvement of the rest of their team

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members in all group assignments that took place within the term. Students who obtain sufficiently poor evaluations from their team members will be penalized. The penalty will involve a reduction in the overall group assignment grades of **all** courses that include group assignments (max penalty: 20% reduction of those grades). More details on the topic are available on eCampus.

**STUDENTS WHO FAIL TO DELIVER ALL THE ASSIGNMENTS WILL NOT BE ALLOWED TO TAKE THE FINAL EXAM.**

All the activities that are submitted past the deadline or that do not follow the submission instructions in terms of content, format, etc. will be considered as 'not submitted'. Students will be informed about the submission and presentation dates the first day of class.

Students are required to attend 80% of classes. Failing to do so without justified reason will imply a Zero grade in the participation/attendance evaluation item and may lead to suspension from the program

Students who fail the course during the regular evaluation are allowed ONE re-take of the evaluation, in the conditions specified above. If the course is again failed after the retake, the student will have to register again for the course the following year.

In case of a justified no-show to an exam, the student must inform the corresponding faculty member and the director(s) of the program so that they study the possibility of rescheduling the exam (one possibility being during the "Retake" period). In the meantime, the student will get an "incomplete", which will be replaced by the actual grade after the final exam is taken. The "incomplete" will not be reflected on the student's Academic Transcript.

Plagiarism is to use another's work and to present it as one's own without acknowledging the sources in the correct way. All essays, reports or projects handed in by a student must be original work completed by the student. By enrolling at any UPF BSM Master of Science and signing the "Honor Code," students acknowledge that they understand the schools' policy on plagiarism and certify that all course assignments will be their own work, except where indicated by correct referencing. Failing to do so may result in automatic expulsion from the program."

### **Reading Materials/ Bibliography/Resources**

CHARLES H. GIBSON. Financial Statement Analysis. South-Western, Cengage Learning (12th edition). 2009

CHURCHILL, G.A (2002). Marketing Research: Methodological foundations (8th edition). Chicago: The Dryden Press.

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COLIN DRURY. Management and Cost Accounting. Cengage Learning (8th edition). 2012

LIND, D.A., MARCHAL, W.G., MASON, R.D. (2008). Statistical Techniques in Business and Economics. (13th edition). Mc Graw-Hill Education.

MERILL\_LYNCH\_-\_Understanding\_financial\_reports (PDF in eCampus)

## Bio of Professor

**Roger Pagà:** is an associate professor at UPF-Barcelona School of Management. Has a PhD in Economics, Finance and Management awarded by Pompeu Fabra University (UPF). As a researcher, he specialises in the study of consumer behaviour, with particular focus on self-regulation, the psychological consequences of money and consumer rituals. He gives lectures in the field of marketing (ranging from consumer behaviour to statistics) at UPF Barcelona School of Management and ESCI-UPF School of International Studies.

**Luz Parrondo:** Luz Parrondo is Director of the Finance and Control Department at the UPF Barcelona School of Management. Director of Master in Financial Management and the Postgraduate in Blockchain and other DLTs. Lecturer at Universitat Pompeu Fabra. PhD in Economics, Finance and Management awarded by Pompeu Fabra University (UPF). As a researcher, she specializes in the study of financial management, with special emphasis on the impact of new technologies in the financial, accounting and auditing sector, in profit management, risk management and corporate social responsibility. Member of the Academic Advisory Body (AAB) of the International Association for Trusted Blockchain. Member of multidisciplinary academic working group on the DLT BAWG – Blockchain & Academia Working Group. Since 2015, she coordinates the professional journal RCD and since 2018 is member of the REA Auditors technology commission. As a professional, Dr. Parrondo worked as Financial Controller and as a Financial Manager in several SMEs in Barcelona. Innovation must never stop.

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