

**МІНІСТЕРСТВО ОСВІТИ І НАУКИ УКРАЇНИ
ХАРКІВСЬКИЙ НАЦІОНАЛЬНИЙ ЕКОНОМІЧНИЙ УНІВЕРСИТЕТ
ІМЕНІ СЕМЕНА КУЗНЕЦЯ**

ЗАТВЕРДЖЕНО

на засіданні кафедри
маркетингу

Протокол № 2 від 02.09.2024 р.



Проректор з навчально-методичної роботи

Каріна НЕМАШКАЛО

УПРАВЛІННЯ ТОВАРНИМИ МАРКАМИ

робоча програма навчальної дисципліни (РПНД)

Галузь знань
Спеціальність
Освітній рівень
Освітня програма

07 "Управління та адміністрування"
075 "Маркетинг"
перший (бакалаврський)
"Маркетинг"

Статус дисципліни
Мова викладання, навчання та оцінювання

вибіркова
англійська

Розробник:
к.е.н., доцент

Сергій Родіонов

Завідувач кафедри
маркетингу

Людмила ГРИНЕВИЧ

Гарант програми

Олена НЕБИЛИЦЯ

**Харків
2024**

**MINISTRY OF EDUCATION AND SCIENCE OF UKRAINE
SIMON KUZNETS KHARKIV NATIONAL UNIVERSITY OF ECONOMICS**

APPROVED

at the meeting of the department
marketing
Protocol № 2 of 2.09.2024

AGREED

Vice-rector for educational and methodical work

Karina NEMASHKALO



TRADEMARK MANAGEMENT
Program of the course

Field of knowledge	07 Management and administration
Specialty	075 Marketing
Study cycle	First (Bachelor)
Study programme	Marketing

Course status	Selective
Language	English

Developers:
PhD (Economics),
Associate Professor

Sergii RODIONOV

Head of Marketing
Department

Lyudmila HRYNEVYCH

Head of Study
Programme

Olena NEBYLYTSIA

**Kharkiv
2024**

INTRODUCTION

The growing attention to the issue of brand management among Ukrainian enterprises is determined by the fact that well-known brands have become a necessary condition for the sustainable position of a company in the market and a factor of its competitiveness in both national and global markets. Markets are becoming increasingly complex and competitive, and innovations in production, distribution, and communication contribute to the emergence of new products in consumer markets, which can only be differentiated through the use of brand names. Unbranded products lose their positions in the market in most product categories.

The aim of the course is to form in students a scientific worldview and deep knowledge of the fundamentals and main components of the brand management system, which includes interrelated elements such as brand concept, development strategy, and marketing support system.

The objectives of the course are: – To study the general principles, theoretical foundations, and main components of the brand management system. – To develop the skills to use theoretical and methodological tools for planning brand concepts and architectures. – To master methods for developing brand attributes and elements, as well as assessing the economic effectiveness of branding in an enterprise.

The object of study in this course is the brand management process.

The subject of the course includes the general patterns, methods, and processes necessary for developing and implementing an effective branding policy, as well as the brand management system

The learning outcomes and competencies formed by the course are defined in table 1.

Table 1

Learning outcomes	Competences	
	general	Special
LO 2	GC 9	--
LO 3	--	SC 4
LO 4		SC 14
LO 5		SC 7, SC 14
LO 6	GC 3	SC 5, SC 7, SC 14
LO 7	--	SC 12
LO 8	--	SC 5
LO 9	GC 7	SC 14
LO 10	GC 7	SC 13
LO 11	--	SC 8
LO 14	GC 4	SC 4
LO 15	--	SC 13
LO 16	--	SC 4, SC 5
LO 19	--	SC 15

where, GC3. Ability for abstract thinking, analysis, and synthesis.

GC4. Ability to learn and acquire modern knowledge.

GC7. Ability to apply knowledge in practical situations.

GC9. Skills in using information and communication technologies.

SC4. Ability to conduct marketing activities based on an understanding of the essence and content of marketing theory and the functional connections between its components.

SC5. Ability to correctly apply methods, techniques, and tools of marketing.

SC7. Ability to determine the impact of functional areas of marketing on the results of the economic activities of market entities.

SC8. Ability to develop marketing support for business development in conditions of uncertainty.

SC12. Ability to justify, present, and implement research results in the field of marketing.

SC13. Ability to plan and conduct effective marketing activities of a market entity in a cross-functional context.

SC14. Ability to propose improvements regarding the functions of marketing activities.

SC15. Ability to develop creative marketing campaigns.

LO2. Analyze and forecast market phenomena and processes based on fundamental principles, theoretical knowledge, and applied skills in marketing activities.

LO3. Apply acquired theoretical knowledge to solve practical tasks in the field of marketing.

LO4. Gather and analyze necessary information, calculate economic and marketing indicators, and justify management decisions using the necessary analytical and methodological tools.

LO5. Identify and analyze key characteristics of marketing systems at different levels, as well as the behavior of their entities.

LO6. Determine the functional areas of marketing activities of market entities and their interconnections in the management system, calculating the corresponding indicators that characterize the effectiveness of such activities.

LO7. Use digital information and communication technologies, as well as software products necessary for proper marketing activities and practical application of marketing tools.

LO8. Apply innovative approaches to conducting marketing activities of market entities, adapting flexibly to changes in the marketing environment.

LO9. Evaluate the risks of conducting marketing activities, establishing the level of uncertainty in the marketing environment when making management decisions.

LO10. Explain information, ideas, problems, and alternative options for making management decisions to specialists and non-specialists in marketing, as well as representatives of various structural units of market entities.

LO11. Demonstrate the ability to apply an interdisciplinary approach and perform the marketing functions of market entities.

LO14. Execute functional duties in a group, proposing justified marketing solutions.

LO15. Act socially responsibly and with civic awareness based on ethical principles of marketing, respect for cultural diversity, and the values of civil society while upholding individual rights and freedoms.

LO16. Meet the requirements expected of a modern marketer and enhance personal professional training.

LO19. Demonstrate skills in developing creative marketing campaigns

COURSE CONTENT

Content Module 1: Theoretical Foundations and Main Components of Trademark Management Systems.

Topic 1: Basic Concepts and Elements of a Brand.

1.1. Essence and Definition of a Trademark. Relationship between the product and the trademark. The trademark as a part of the product.

1.2. Key Elements and Features of a Brand. Brand identity. The concept of a trademark as part of the brand.

1.3. Main Functions and Advantages of a Trademark. The trademark as a component of modern marketing.

1.4. Classification of Trademarks. Types of trademarks and trade names. Global and national brands.

Topic 2: Theoretical Foundations of Trademark Management.

2.1. Historical and Evolutionary Aspects of Trademark Management Theory and Practice. Content, significance, and features of brand policy in the company's marketing system.

2.2. Key Decisions in Trademark Management. Basic principles and models of trademark management. Managing trademark assets.

2.3. Diagnosis of the Trademark's Condition: Assessment of brand awareness, popularity, and strength. Rankings of the most valuable trademarks.

Topic 3: Managing Brand Systems.

3.1. Brand System. Features and content of the trademark system. Key requirements for creating a brand system.

3.2. Brand Hierarchy. Main brand. Endorsed brand. Product line brands. Combined and connected brands. Sub-brands. Roles of sub-brands. Relevance and feasibility of using sub-brands.

3.3. Managing the Development of Brand Systems. Brand expansion. Support for vertical and horizontal brand expansion. Criteria for choosing the number of brands. Audit of trademark systems.

Content Module 2: Practical Foundations of Developing and Justifying Strategic Directions for Brand Development.

Topic 4: Strategic Decisions in Trademark Management.

4.1. Strategic Decisions in Trademark Management.

Content, tasks, and prerequisites for forming a trademark management strategy. Defining strategic directions for brand development. Brand strategy as an essential foundational stage in planning the marketing policy of enterprises.

4.2. Characteristics of Main Brand Strategies. Brand extension strategy, multi-brand approach, brand repositioning, branding, rebranding.

4.3. Features of Brand Strategy Application. General framework for developing a brand development strategy. Stages of implementing the brand strategy. Evaluation of the effectiveness of strategic decisions in trademark management.

Topic 5: Developing Effective Trademarks.

5.1. Organizing the Trademark Creation Process. Features and content of the trademark creation process. Methodology and technology for building and developing a trademark.

5.2. Stages of the Trademark Creation Process. Characteristics of the trademark creation process. Developing and testing the trademark concept. Creating the name (naming) and graphic identity elements; forming the marketing mix for the trademark.

5.3. Trademark Integrity Control Program. Developing functional and elemental models. Designing the trademark. Defining the informational image of the trademark. Choosing possible communication directions to activate the trademark.

Topic 6: Registration and Protection of Trademarks in Ukraine.

6.1. Main Legislative Acts Regulating the Trademark Registration and Protection Process. Law of Ukraine "On the Protection of Rights to Marks for Goods and Services." Paris Convention for the Protection of Industrial Property. Madrid Agreement on International Trademark Registration of April 14, 1981.

6.2. International Classification of Goods and Services for Trademark Registration. Main provisions of the International Classification of Goods and Services for Trademark Registration (Nice Classification).

6.3. Key Conditions, Content, and Features of the Trademark Registration Procedure. Features of conducting a qualification examination regarding the protectability of the trademark. Procedure for trademark registration. Timeframes and costs of the trademark registration process in Ukraine.

Topic 7: Key Aspects of Brand Equity Assessment.

7.1. Brand Equity: Concept and Content. Concept and marketing content of brand equity. Managing trademark assets.

7.2. Main Approaches to Brand Equity Assessment. Characteristics of the main approaches to brand equity assessment. Functionality, image, quality, and impressions in brand equity development. Alternative approaches to assessing brand value.

7.3. Methods of Valuing Brand Equity. Characteristics, features, and content of the brand valuation methodology by Interbrand; Brand Finance methodology; Brand Equity Ten model.

The list of practical (seminar) studies in the course is given in table 2.

Table 2

The list of practical (seminar) and classes / tasks for the course

Topic and tasks	Content
Topic 1. Task 1	Key components (characteristics, attributes) of a brand. examples of multisensory components of a brand used to create auditory, tactile, taste, or olfactory effects for brand recall.

Topic 2. Task 2	Examples of the most influential global and national brand rankings. factors influencing the development and dissemination of branding policies for the most famous and valuable global (national) brands.
Topic 3. Task 3	Presentation of the Product Brand Portfolio of a Company.
Topic 4. Task 4	Construction of a Brand Perception Map in the Brand Management Strategy of the Company. Determining the identity and level of integrity and strength of the brand based on the model by Jean-Noël Kapferer (or the "Brand Wheel" model, or the Thompson Total Branding model).
Topic 5. Task 5	Development of a Logo and Brand Name for a New Product Using Modern Internet Technologies and Naming Techniques.
Topic 6. Task 6	Procedure, Timeline, and Cost of Trademark Registration in Ukraine. Key conditions for trademark registration. Features of the qualification examination regarding the trademark's registrability.
Topic 7. Task 7	Brand Equity Assessment. Main methods for evaluating brand value. Methodology for brand valuation from Interbrand and Brand Finance.

The list of self-studies in the course is given in table 3.

Table 3

List of self-studies

Topic and task	Content
Topic 1 – 7	Study of Lecture Material
Topic 1 – 7	Preparation for practical
Topic 1 – 7	Individual work
Topic 3, 5	Presentation
Topic 1 - 7	Preparation to Exam

The number of hours of lectures, practical (seminar) studies and hours of self-study is given in the technological card of the course.

TEACHING METHODS

In the process of teaching the course to achieve specific learning outcomes and activate the educational process, the following teaching methods are planned:

Verbal (Lectures (Topic 1, 2, 4, 5, 6), Problem lectures (Topic 3, 6), mini-lectures (Topic 3, 5, 7)).

Visual (demonstration (Topics 1-7)).

Practical (practical work (Topic 1 – 7), Presentation (Topic 3, 5), Keys-met (Topic 5)).

FORMS AND METHODS OF EVALUATION

The university uses a 100-point cumulative assessment system for evaluating the learning outcomes of higher education students.

Current Assessment is conducted during lectures, practical and seminar sessions and aims to check the student's preparedness for specific tasks. It is assessed based on the total points earned:

For courses with a final exam:

Maximum points: 60

Minimum points to sit the exam: 35

Final Assessment includes semester control and the student's overall evaluation. Semester control is conducted in the form of a final exam. The final exam is held during the examination session.

Maximum points for the exam: 40

Minimum points required to pass the exam: 25

The overall grade for the course is determined as follows:

For courses with a final exam: the sum of points from current and final assessments.

The following assessment methods are used during the course:

Current Assessment: Individual practical tasks (30 points), presentation submissions (10 points), colloquium (20 points).

Final Assessment: Exam (40 points).

More detailed information on the assessment system is provided in technological card of the course.

An example of an exam card and assessment criteria.

Example of an Examination Card

Kharkiv National Economic University named after Simon Kuznets

First (Bachelor's) level of higher education

Specialty: "Marketing"

Educational and Professional Program: "Marketing"

Semester: 5

Course: "Trademark management"

EXAMINATION CARD №1

Task 1 (stereotypical). (10 points)

The essence and definition of a trademark management. Key characteristics (attributes) of a brand.

Task 2 (diagnostic). (15 points)

The well-known Ukrainian producer of biscuit and confectionery products "Kharkiv Biscuit Factory" produces chocolate cookies under Trademark the name "Polius." To which classification group can this Trademark be assigned? What specific components define its uniqueness? Construct a Trademark perception map. What technologies and naming methods were used in creating the trademark name?

Task 3 (heuristic). (15 points)

One of the main goals of a company that owns a brand is to achieve a strong chain of relevant associations in the consumer's mind regarding this Trademark. Only a Trademark that has achieved positive consumer perception and ensured a high level of loyalty becomes well-known in the market and brings additional capital to its owner. The Kharkiv company LLC "Neolux" is one of the leaders in the orthopedic mattress market in Ukraine and in the city of Kharkiv. The company produces a wide range of mattresses under the Trademark names Elite Prestige and Standard classes under the brand NEOLUX. To which classification group can this brand be assigned? What specific components define its uniqueness? Construct a brand perception map. Using naming technologies and methods, propose a trademark name for a new product from LLC

"Neolux" – a thin mattress made of natural latex with thermoregulating properties in a cover made of innovative fabric containing natural cotton and wool fibers.

Evaluation criteria

The final score for the exam consists of the sum of points for completing all tasks, rounded to the nearest whole number according to mathematical rules.

The algorithm for solving each task includes distinct stages that vary in complexity, labor intensity, and significance for solving the task. Therefore, individual tasks and the stages of their solution are assessed separately as follows:

Table 4

Evaluation criteria

№	Point	Evaluation criteria
Theoretical task	7-8	Errors in the definition of categories, terms, and concepts have been made. Characteristics of the categories are not provided, and there is a lack of structured generalization and justification of the theoretical analysis.
	9	The response contains definitions of categories, terms, and concepts. Characteristics of the categories are provided, but there is a lack of structured generalization and justification of the theoretical analysis
	10	The task has been completed fully, with no errors in the definitions of categories, terms, and concepts. Characteristics of the categories are provided. The conclusions are justified and correspond to the essence of the theoretical task.
Diagnostic task	8-9	Errors have been made in the interpretation of concepts, incorrect examples have been provided that do not align with the interpretation of indicators and categories, and conclusions are missing
	10-11	The task is completed partially, lacking the connection to concepts and categories, and the conclusions are incorrect
	12-13	The task is fully completed without errors. However, there is an incorrect interpretation of analytical data and methodological tools. The conclusions are not sufficiently justified
	14-15	The task is fully completed without errors, with the presentation and justification of the connection to concepts and categories. The conclusions are well-founded and correspond to the essence of the task
Heuristic task	10	The task is partially completed, with errors in the definitions of categories, terms, and concepts. Conclusions and a justified analysis of the obtained results are missing
	11	The task is completed, with correct definitions, concepts, and categories provided. However, the project solutions are superficial and lack originality, the conclusions are incorrect, and there is no justified analysis of the obtained results.
	12-13	The task is completed, with correct concepts and categories provided. However, the project solution does not sufficiently reveal the graphic-visual and marketing essence of the task, and the conclusions are not adequately justified
	14	The task is completed, with correct solutions to the problem situation, the essence of their components is revealed, and correct interpretations of concepts and categories are provided. However, the marketing essence of the task and the conclusions are not adequately justified
	15	The task is completed, all conditions meet the requirements, and there is a justified conclusion regarding the implementation of the proposed recommendations for the development of the marketing situation presented in the task

RECOMMENDED LITERATURE

Main

1. Aaker D. Branding: too often overlooked in disruptive innovation and social purpose arenas / D.Aaker // *Journal of Brand Management*. – 2023. – Vol. 30. P. 185–189.
2. Kudina A. Dominants of development of ukrainian clothing brands. *Marketing Technologies of Business Development: monograph* / Edited by Mykhailo Oklander, Magdalena Wierzbik-Strońska. Katowice: Wydawnictwo Wyższej Szkoły Technicznej w Katowicach, 2020. 106–113 p.
3. Castaldi, C., and S. Mendonça. 2022. Regions and trademarks: Research opportunities and policy insights from leveraging trademarks in regional innovation studies. *Regional Studies* 56 (2): 177–189. Access: <https://www.tandfonline.com/doi/pdf/10.1080/00343404.2021.2003767>
4. Rodionov S. Strategies for promotion of national brands on the international market / S. Rodionov, V. Pavtsio // *Strategies, Models and Technologies of Economic Systems Management. FAI International Conference, 2021*. – Vol-7(ii). – P. 34-35. <http://www.repository.hneu.edu.ua/handle/123456789/27786>
5. Blyznyuk T. Theoretical aspects of branding for the development of brand management strategy at Ukrainian enterprises / T. Blyznyuk, O. Maistrenko // *Ukrainian Journal of Applied Economics and Technology*. – 2023. – Vol. 8. – № 1. – P. 150 – 158. <http://www.repository.hneu.edu.ua/handle/123456789/29554>

Additional

6. DeGrazia, C.A.W., A. Myers, and A.A. Toole. 2020. Innovation activities and business cycles: Are trademarks a leading indicator? *Industry and Innovation* 27 (1–2): 184–203. Access: <https://www.tandfonline.com/doi/abs/10.1080/13662716.2019.1650252>
7. Rodionov S. O. Current trends in industry and features of marketing activities / S. O. Rodionov // *Вісник Східноукраїнського нац-го універ-ту ім. В. Даля*. – Сєвєродонецьк, 2021. – № 3 (267). – С. 132-136. <http://www.repository.hneu.edu.ua/handle/123456789/26048>
8. The Law of Ukraine "On the Protection of Rights to Trademarks and Service Marks" // *Bulletin of the Verkhovna Rada of Ukraine*. – 2008. – No. 23. – P. 217.

Information resources

9. The Madrid Agreement on the International Registration of Marks of April 14, 1981 [Electronic resource]. – Access mode: https://zakon.rada.gov.ua/laws/show/995_134?lang=en#Text
10. Ranking of the most expensive brands in the world by the company InterBrand «Best Global Brands». Access: <https://interbrand.com/best-global-brands/?filter-brandcountry=>
11. The website of the All-Ukrainian Advertising Coalition – Access mode: <https://vrk.org.ua/about-vrk.html>

12. The website of the Ukrainian Marketing Association. – Access mode:
<https://uam.in.ua/en/home/>
13. PNS. Trademark management:
<https://pns.hneu.edu.ua/course/view.php?id=11270>