

**SWP 61/91 "STRATEGIC MARKETING PLANNING:
A STATE OF THE ART REVIEW"**

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STRATEGIC MARKETING PLANNING : A STATE-OF-THE-ART REVIEW

By Professor Malcolm H B McDonald
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Introduction

"A good big 'un' will always beat a good little 'un'". So say the aficionados of the noble art of pugilism. They are undoubtedly correct in what they say, because their experience confirms this to be true. However, there are two very important, unspoken, assumptions which colour this thinking. These are, that the contest is limited to the confines of a boxing ring, and conducted under the Marquis of Queensbury Rules.

Given these conditions, the heavier fighter will always triumph over his lighter-weight adversary. David would never have been able to overcome Goliath, had such a handicap been imposed upon him. Nor would Drake have defeated the vastly superior Spanish Armada.

Both of these apparently disadvantaged competitors owed their success to doing the unexpected. They refused to play the game on their opponent's terms and slog it out, toe to toe. Instead, they turned their lack of physical strength into a strategic advantage of nimbleness, speed of attack and surprise.

In essence, strategic marketing planning is an approach to business which, like the stories above, can enable even the smallest competitor to survive successfully. However, as we shall see, there is no simple 'magic formula' which can be administered. There is no marketing equivalent of Aladdin's lamp, which can make an organisation's dreams come true.

Strategic marketing demands a perceptive and intelligent analysis of both the company and its business environment. The resulting plan then requires equal proportions of perspiration and inspiration to make it come alive, and be brought to fruition.

This state-of-the-art review will focus on two main themes;

1. The development of the 'tools' and techniques available to the strategic marketing planner.
2. The barriers which hamper the introduction of strategic marketing planning, or serve to reduce its effectiveness.

However, before this is done, it will be necessary to define marketing planning and examine its 'pedigree'.

What is Marketing Planning?

The overall purpose of marketing planning, and its principal focus, is the identification and creation of a competitive advantage. Yet after twenty years of involvement as a researcher (McDonald 1984), a teacher and a writer about the subject, the

author of this paper has experienced little to change his view that marketing planning is still the most enigmatic of all the problems facing management as they brace themselves for whatever challenges the coming years hold.

In simple terms, marketing planning is a logical sequence of activities which leads to the setting of marketing objectives and the formulation of plans to achieve them. In small undiversified companies this process, if it exists at all, is usually informal. In larger more complex organisations, the process is often systematised.

Usually the planning process involves a situation review, the formulation of some basic assumptions about what constitutes the strengths and weaknesses of the organisation, a comparison with how these weigh against the opportunities and threats posed by the business environment, setting objectives for what is sold and to whom, deciding how the objectives are to be achieved, and costing out and scheduling the actions necessary for implementation.

Apart from helping the organisation to cope with increasing turbulence, environmental complexity, more intense competitive pressures, and the sheer pace of technological change, a marketing plan is useful for the organisation, for managers, for non marketing functions, and for subordinates:

- to help identify the source of competitive advantage;
- to instil an organised approach to business development;
- to develop specificity;
- to clarify roles and improve co-ordination;
- to ensure consistent relationships;
- to inform;
- to provide a context for their contributions;
- to monitor progress;
- to get resources;
- to set objectives and strategies;
- to inform;
- to gain commitment.

Taken all round, marketing planning appears to provide numerous benefits for the organisation, and for this reason ought to be very well accepted as part of its standard operating procedures. However, such a state of affairs falls far short of the truth.

Greenley's recent (1987) study of marketing planning identified only seven UK empirically based studies into the marketing planning practices of commercial organisations. The remaining mass of publications are largely prescriptive and amount to little more than logically deduced theories based on ungrounded assumptions (what Glaser and Strauss (1967) refer to as "exampling"). Most of the empirical studies concluded that few companies actually practice the theory of marketing planning so prolifically written about by so many.

But, even more disturbing, those who recognised the need for a

more structured approach to planning their marketing and who turned to the formalised procedures found in prescriptive texts, rarely enjoyed the claimed benefits of marketing planning. Indeed, the very opposite sometimes happened, in that there were actually dysfunctional consequences, which brought marketing planning itself into disrepute.

This will come as no surprise to those keen observers who have noted that some companies who plan their marketing meticulously, fare badly, whilst their cavalier and inept (in marketing terms) contemporaries do well.

It raises the question about whether there is, or whether there has ever been, a relationship between marketing planning and commercial success.

A recipe for commercial success?

The claimed benefits of better coordination of inter-related activities, improved environmental awareness, better communication among management, better use of resources, and so on, really are there for the taking, and there is a relationship between marketing planning and commercial success, as the work of McDonald (op cit), Thompson (1962) Kollatt et al. (1972), Ansoff (1977), Thune and House (1970), Leighton (1966) and others has shown. It is just that the contextual problems surrounding the process of marketing planning are so complex and so little understood, that effective marketing planning rarely happens. What these problems are and how they can be overcome will be dealt with a little later.

The fact that financial performance at any one point in time is not necessarily a reflection of the adequacy or otherwise of planning procedures, (since some companies just happen to be in the right place at the right time, usually in growth industries), should not deflect us from this fundamental truth. Those who want to know what marketing planning can add in a situation where a company has a well established position, and where success to date has not been based on any particularly rigorous approach to marketing planning, should remember that all leadership positions are transitory. No industry based in the United Kingdom should need reminding of that today. The rapid and systematic demise of the UK's world leadership position is an insult to the founding fathers of British industry.

It is easy to forget the financially-driven management of the 60s and 70s who milked dry the results of the endeavours of their entrepreneurial forebearers. Rationality to them meant only short-term profits on a product-by-product basis, and if this meant raising the price or deleting the product, who cared as long as the end-of-year profit and loss account came out right? Regard for competitive position, market share, promotion, customer franchise, R & D and the like (all of which, of course, are funded from revenue) seemed irrelevant in those halcyon days of high growth.

Nor should we fool ourselves that this sad state of affairs has changed. A recent study (Wong, Saunders and Doyle 1988) of Japanese and British companies in the UK concluded that 87% of British firms still have profit maximization as their major short-term goal, whilst 80% of their Japanese competitors have market share growth as their major short-term goal. It is a sad reflection on our business schools in the UK that so many of our top industrialists still behave like vandals in the way they manage their marketing assets. It is little wonder that so many of our famous industries and names such as Woolworths, Dunlop, British Leyland and countless others, have had to suffer the humility of near bankruptcy, and it is a pity that so many more will have to suffer the same fate before we come to our senses and see that marketing planning is crucial to our long-term survival and prosperity.

Whatever the shape or size of the company, marketing's contribution to business success lies in analysing future opportunities to meet well-defined needs. This means that products and services need to provide the sought-after benefits in a superior way to that of competitors.

Let us now turn to the question of the techniques which are available to the marketer, and why it is that they are often neglected, or used in inappropriate ways. To a large extent, this is a reflection of the marketer's understanding of the theory behind the techniques.

DOES MARKETING THEORY HAVE ANY VALUE?

Stephen King's sensitive paper (1983) on applying research to decision-making focused attention on Britain's lack of innovation as one of the key causes of Britain's industrial demise since the war. His main argument centred around the belief that marketing research in general had failed to address the real marketing issues, because so much of it is quantitative.

He covered most forms of research in his review, including retail audits, TV ratings, multiple choice motivational research, conjoint analysis. Fishbein, econometrics and gap analysis, concluding that they can actually be destructive to innovation if applied directly to decision making.

"I believe part of our national failure to innovate has come through trying to use market research not as an aid to decision making, but as a system that ideally reduces all personal judgement to a decision as to which of two numbers is the larger."

In a similar vein, Roger Evered (1981) wrote of the emerging realisation that the positivistic science paradigm inherited from the physical sciences has serious shortcomings for the managerial and organisational sciences, and he concluded:

"We must move beyond the objective, analytic, reductionist, number-oriented, optimising and fail-safe approach to future

problems, and learn to think with equal fluency in more subjective synthesising, holistic, quantitative, option-increasing ways."

More recently, John Hughes (1988), in his wide-ranging review of the teaching of management education, concluded:

"The mistake we have made in teaching during the past 40 years has been to follow the logic approach to the physical sciences in teaching theory first, followed by an assumed application in practice ... The bridge from theory to practice is too hard to cross without some prior experience of the 'other side'...

A common theme running through the substantial literature on the growing concern about the appropriateness of the positivistic science paradigm for understanding the process of management, is that much of management deals with judgement, diagnosis, and interpretation of events, which requires a different kind of knowing from logic and rationality.

Donald Schon (1984) describes scientific rigour as "describable, testable, replicable techniques derived from scientific research, based on knowledge that is testable, consensual, cumulative and convergent," but then goes on to argue that much of what passes for scientific management is irrelevant because business problems do not come well formed. Certainly, most marketing problems are messy and indeterminate and successful practitioners make judgements using criteria which are difficult to define. Many academics would decry this as a lack of rigour, and in so doing exclude as non-rigorous much of what successful practitioners actually do.

It is this theme which is of particular relevance to marketing. Moreover, it has less to do with its origin in the positivistic model of science than with the failure of the academic world to understand better what needs to be done to bridge between theory and practice.

THE GAP BETWEEN THEORY AND PRACTICE

First, however, it is necessary to reiterate that marketing theory is not practised in industry. In no other discipline outside marketing is the gap between theory and practice so great. In March 1989, Tony McBurnie (1988), Director General of The Chartered Institute of Marketing, wrote:

"Research in the early 1980s showed that some two thirds of British companies did not have clearly defined market strategies and did not use basic marketing disciplines."

Almost three quarters of organisations rely principally on extrapolative techniques and financial husbandry. In very few cases is it possible to find any evidence of the use of some of the more substantive techniques taught on most marketing courses, such as the Ansoff Matrix, product life cycle analysis, diffusion of innovation, the Boston Matrix, the Directional Policy Matrix,

and other strategic and tactical marketing devices.

Nor is this just a European phenomenon. An interesting conclusion from the MSI Expert System Project, ADCAD (1988) was that although American companies would actually like to make use of existing theoretical knowledge of marketing, few did.

The most recent study on this topic by Reid, D.M. and Hinkley, L.C. (1989) concluded:

"Respondents were asked which techniques they were familiar with. The results were skewed towards ignorance of all the techniques to which they were exposed. The majority were not at all familiar with any by name. The level of awareness of the techniques was not significantly different between Hong Kong and the UK."

The specific techniques which were the focus of the study included: BCG; Directional Policy Matrix; Ansoff Matrix; PIMS; and the Experience Curve.

Similar findings have also emerged from Australia.

There are numerous possible explanations for this lack of usage in industry of the everyday tools of marketing teachers. For example:

- * Companies have never heard of them;
- * Companies have heard of them, but do not understand them;
- * Companies have heard of them, have tried them and found that they are largely irrelevant.

Whilst all of these (and others) are distinct possibilities, it would be naive not to recognise also that marketing is essentially a political process, involving organisational, interpersonal, cultural and social issues which in themselves appear to have no existence as observable entities, since they are contextual and are continuously changing and evolving.

Recent research into marketing and corporate culture (Leppard 1987) goes part of the way in explaining some of the blockages to the implementation of marketing theory as we shall see later. Nonetheless there remains the question of why so many companies that genuinely strive to adopt a marketing orientated approach to doing business still repeatedly fall back on fiscal rather than marketing measures to direct and control the business. In such circumstances, one is left wondering why companies find it so difficult actually to implement what is taught about marketing in business schools.

MARKETING TECHNIQUES/STRUCTURES/Frameworks

Most foundation courses in marketing cover at least the following basic frameworks:

- * The Ansoff Matrix;
- * Market Segmentation;

- * Product Life Cycle Analysis;
- * Portfolio Management (Boston Box and the Directional Policy Matrix)
- * Marketing research and Marketing Information Systems.

Additionally, a host of techniques revolve around the four basic elements of the marketing mix, Product, Price, Promotion; and Place. Even a cursory glance through Philip Kotler's standard marketing management text reveals a vast and complex armoury of tools and techniques that can be used by marketing practitioners to gain a sustainable competitive advantage for their product or service.

During the past three decades, each one has been the focus of numerous academic and practitioner papers which have sought to explain their complexities and to persuade managers to adopt them as part of the process of marketing management.

Eagerly, devotees of the 'new' message will denounce or drop all the earlier received wisdom as they attempt to force their problems into the latest answer. When the latest fad fails to live up to expectations, it too begins to fade into obscurity, except at management education establishments, where it becomes part of the standard fabric of teaching.

There are, however, a number of problems with this somewhat simplistic explanation of the product life cycle effect on each of the tools and techniques. These problems revolve firstly around methodological problems associated with the actual tools and techniques themselves, and secondly with the complexity of trying to link a number of them together.

PROBLEMS OF UNDERSTANDING

If we take a look at some of the more important structures and frameworks used in marketing management, we will observe a number of issues of varying degrees of difficulty in understanding, hence in application.

The product life cycle is a case in point. There is clearly a difference between a **product** life cycle and a **brand** life cycle (Doyle 1989). It is also pointless for a firm to draw a product life cycle of one of its own products without also drawing a life cycle at least of the product class to which it belongs. But the question of how to define the product class (market) to which it belongs is fraught with difficulties. Furthermore, the linkage between the product life cycle and the diffusion of innovation curve needs to be properly understood. For example, high priced calculators first diffused through the scientific market, then the professional market, then the business market, then the general market, and finally the school children market. Each bell-shaped diffusion was followed by another, each time adding to the absolute sales curve depicted by the product life cycle, with different cost and strategy implications along the way.

Failure to understand basic points such as these and others has

destined p.l.c. analysis to be a topic of interest solely to interested academics. In the world of business it lies largely dormant.

Another well-known, under utilised and misunderstood tool taught by marketing academics is the **directional policy matrix** (McDonald 1990). For example, the criteria for the vertical axis (market attractiveness) can only be determined once the population of "markets" has been specified. Once determined, those criteria cannot be changed during the exercise. Another common mistake is to misunderstand that unless the exercise is carried out twice - once for t_0 and once for $t+3$, - the circles cannot move vertically. Also, the criteria have to change for every "market" assessed on the horizontal axis each time a company's strength in market is assessed. Some way has also to be found of quantifying the horizontal axis to prevent every market appearing in the left hand box of the matrix. If we add to this just some of the further complexities involved, such as the need to take the square root of the volume or value to determine circle diameter, the need to understand that the term "attractiveness" has more to do with future potential than with any externally derived criteria, and so on, we begin to understand why practising managers rarely use the device. Indeed, one cannot help wondering whether all the academics have sufficient understanding of all the technique to be able to teach it competently.

Even Michael Porter's apparently more easily assimilated matrix describing the relationship between costs and degree of marketing differentiation has become the latest victim of misunderstanding and abuse through ignorance (Speed 1989).

Reid and Hinkley (op cit) drew the following conclusion from their own study. "It reflects a failure of business schools to disseminate knowledge of strategic methodologies."

The main problem, however, is not just that virtually every tool and technique of marketing is open to serious misunderstanding and abuse, but that no one method by itself can deliver the kind of benefits demanded by practising managers. Most academics would readily acknowledge the singular contribution to diagnosis that can be made by each device, irrespective of whether it is from the school of life or the more rigorous academic school. For example, whilst it is easy (and tempting) to dismiss most of what Tom Peters had to say (1982) (largely because of its lack of rigour), few would deny his contribution to marketing by dint of the attention he focused on the need to service the needs of our customers effectively. Likewise, anyone who tries to run their company just on the basis of what Michael Porter says, soon discovers the inherent inadequacies of the nostrum, just as those did who worshipped at the altar of Bruce Henderson and the Boston Consulting Group in the late 1960s and the early 1970s. Yet few would deny the abiding relevance to business in the 1990s of what all these great writers, researches and teachers had to offer.

To summarise, not only are most of the tools and techniques

themselves inherently complex (and therefore misunderstood and misused), but no one tool on its own is adequate in dealing with the complexity of marketing.

PROBLEMS OF TECHNIQUE INTERRELATIONSHIPS

There is then, clearly a need to be able to use a number of these tools and techniques in problem-solving, especially when a process as complex as strategic marketing planning is concerned. This raises an additional dimension of complexity for both academics and practising managers, for it then becomes necessary to understand not only the techniques themselves, but the nature of the interrelationships between them, how inputs for one mode can also be used for another and how outputs from some models can also be used as inputs to others.

The problem is that the human mind just isn't capable of dealing adequately with such complexity. This view has gradually emerged as a result of working on a computer-based Expert System for Strategic Marketing Planning, (McDonald 1989) and is confirmed by a number of researchers, including most recently Lock and Hughes (1989).

A DIFFERENT APPROACH IS REQUIRED

In the process of constructing the Expert System for strategic marketing planning, it became clear that what was needed was some system to link the numerous artifacts of marketing in such a way that outputs from one technique could be used as inputs to other techniques. This was indeed the missing link, as in books and in paper-based marketing planning manuals, the process of marketing planning had of necessity to be iterative, with the onus resting on the user to understand the interrelationships between the techniques used.

The route to this discovery was the Data Model represented in Figure 1.

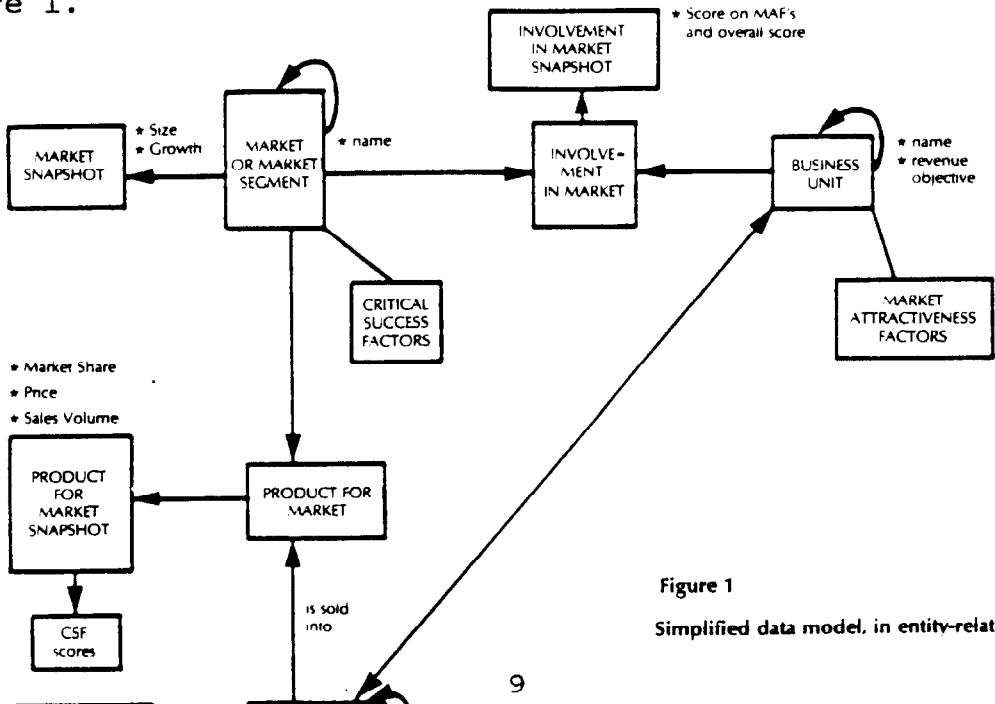


Figure 1
Simplified data model, in entity-relationship notation

Here, the basic model consists of a Strategic Business Unit (SBU) (which can be anything from a corporate headquarters to an individual product), which is involved in a number of **markets**, and for which it produces a number of **products** (or services). The system starts with the definition of a **mission** (or purpose) statement for the SBU and indicates very clearly the acceptable structure and content of such a document.

The next stage in the process was the definition of the contents of a strategic marketing plan and the listing of some of the principal tools and techniques which may be relevant to each of its component parts. It will be seen from Figure 2 that some of these techniques may be used for several parts of the plan. However, this does not delineate sufficiently clearly the nature of the technique interrelationships, so it was necessary to define in more detail the actual **process** involved in the preparation of a strategic marketing plan.

Figure 3 indicates the key steps in the preparation of a strategic marketing plan and some of the subsidiary tasks that have to be completed at each stage.

Each one of the boxes on the "tree" has associated with it a number of marketing tools and techniques, so the next task was to allocate these to each of the main stages in the process.

Figure 2

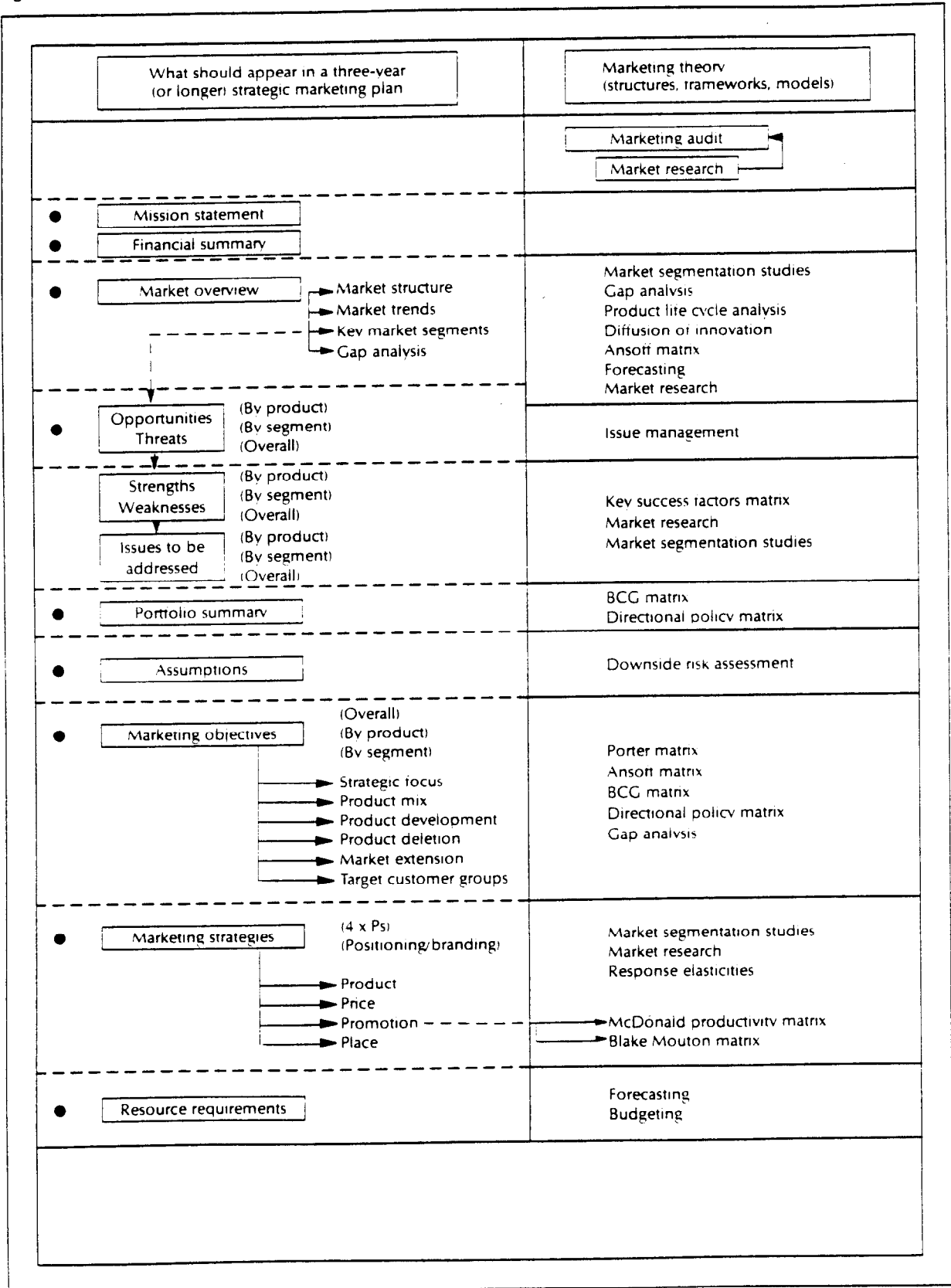
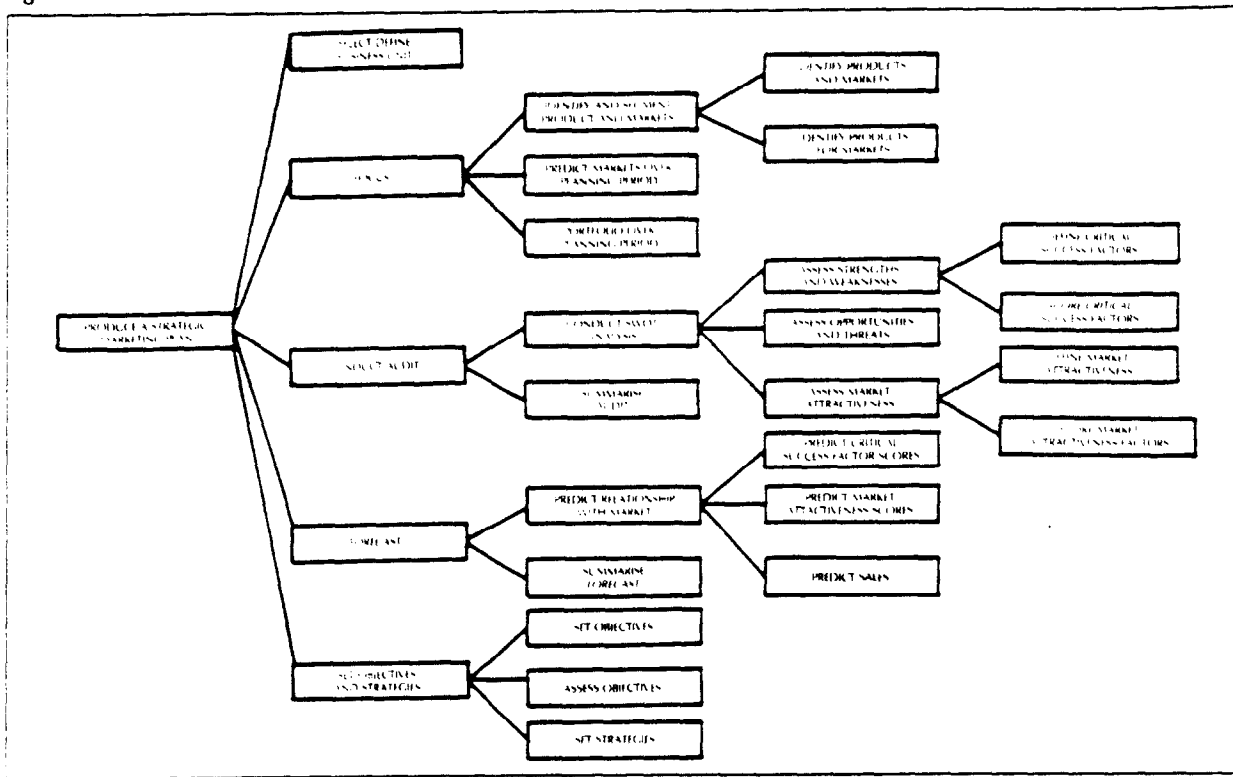


Figure 3



Figures 4, 5, 6 and 7 indicate the relationships between the several techniques of marketing at selected stages in the process of marketing planning.

Figure 4

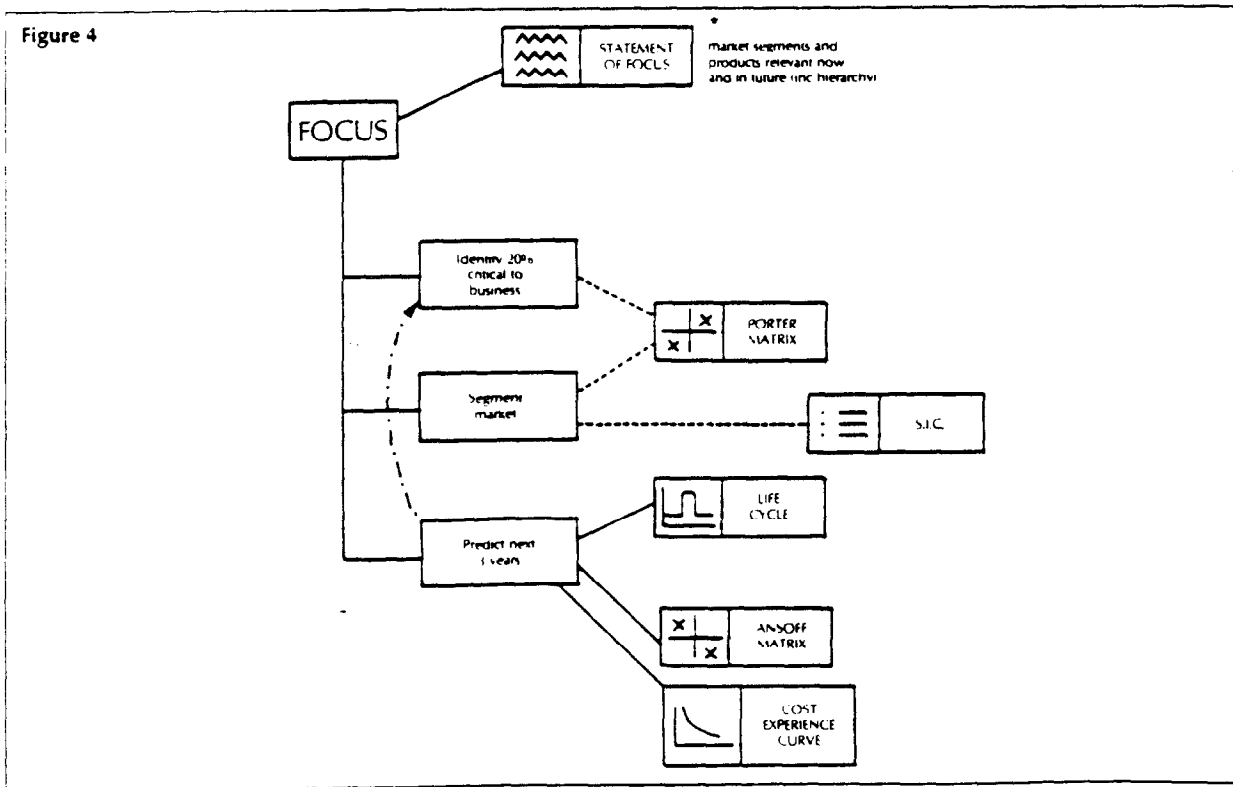
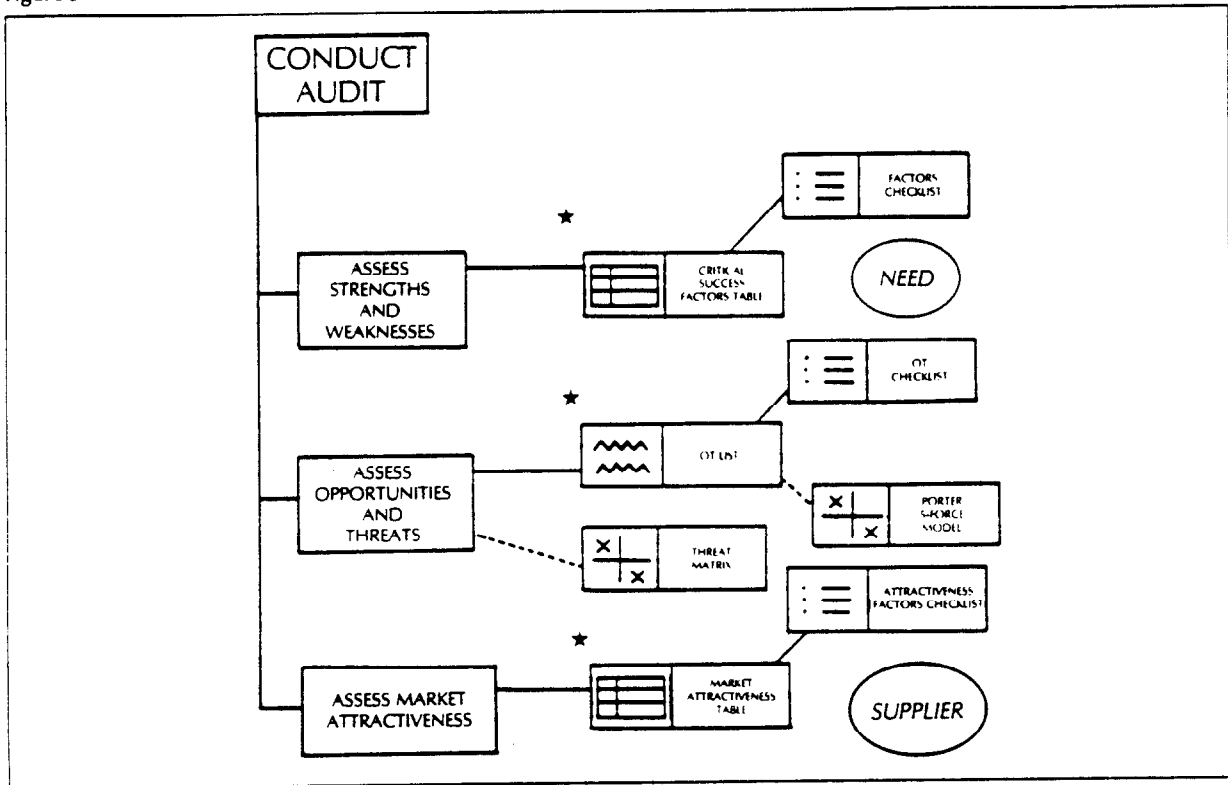


Figure 5



At the focus stage (Figure 4), for example, the output is a statement of those elements of the SBU selected for analysis. In arriving at this focus, Pareto's law is clearly relevant, as are market segmentation studies (the SIC is provided in the computer system as a possible starting point for market segmentation). Porter's cost/differentiation matrix may also be useful at this stage if there is a need to have a balance between high volume, low cost markets and more differentiated, niche type markets. The product life cycle could clearly be useful in helping decide which markets appear more attractive, as could a knowledge of the cost impact of experience. The Ansoff Matrix is also included here because product market data associated with

each of the four boxes could be useful in indicating the balance between existing and new activities.

Figure 6

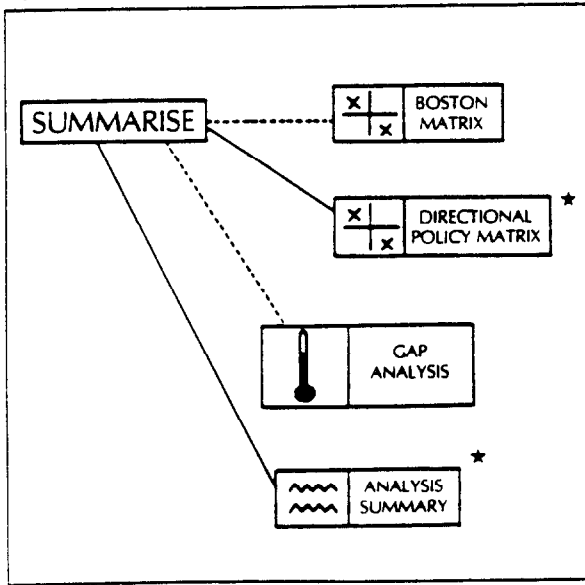
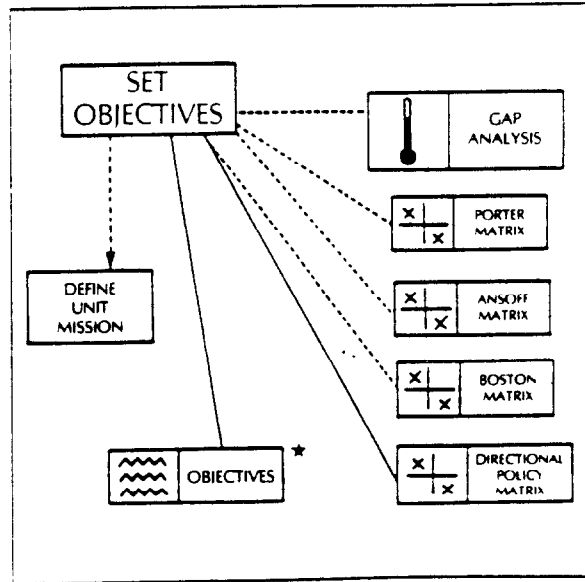


Figure 7



The purpose of the **Audit Stage** (Figure 5) is to complete an in-depth diagnosis or analysis of the selected products and/or markets from the Focus stage. Provided here are several checklists to help the program user. The Porter five force model may, for example, provide useful guidelines at this stage. Detailed instructions on how to construct tables for critical success factors are given, as well as methodological instructions on how to deal quantitatively with external opportunities and threats.

The **Audit Stage** has to be summarised (Figure 6) and here the Boston Matrix and the Directional Policy Matrix can be useful pictorial representations of the current product/market status. Each one of these techniques emphasises different aspects of the same situation. Likewise, Gap Analysis provides a visualisation in summary form of the revenue and cost implications of current strategies.

It will be seen that the same tools can also be used in the process of **Setting Objectives**, except that this time they are extended to indicate the desired position at some designated point of time in the future.

Figures 8, 9 and 10 indicate relationships between the techniques themselves.

Figure 8 shows the relationship between some of the principal techniques and their relevance to the basic Data Model given in Figure 1.

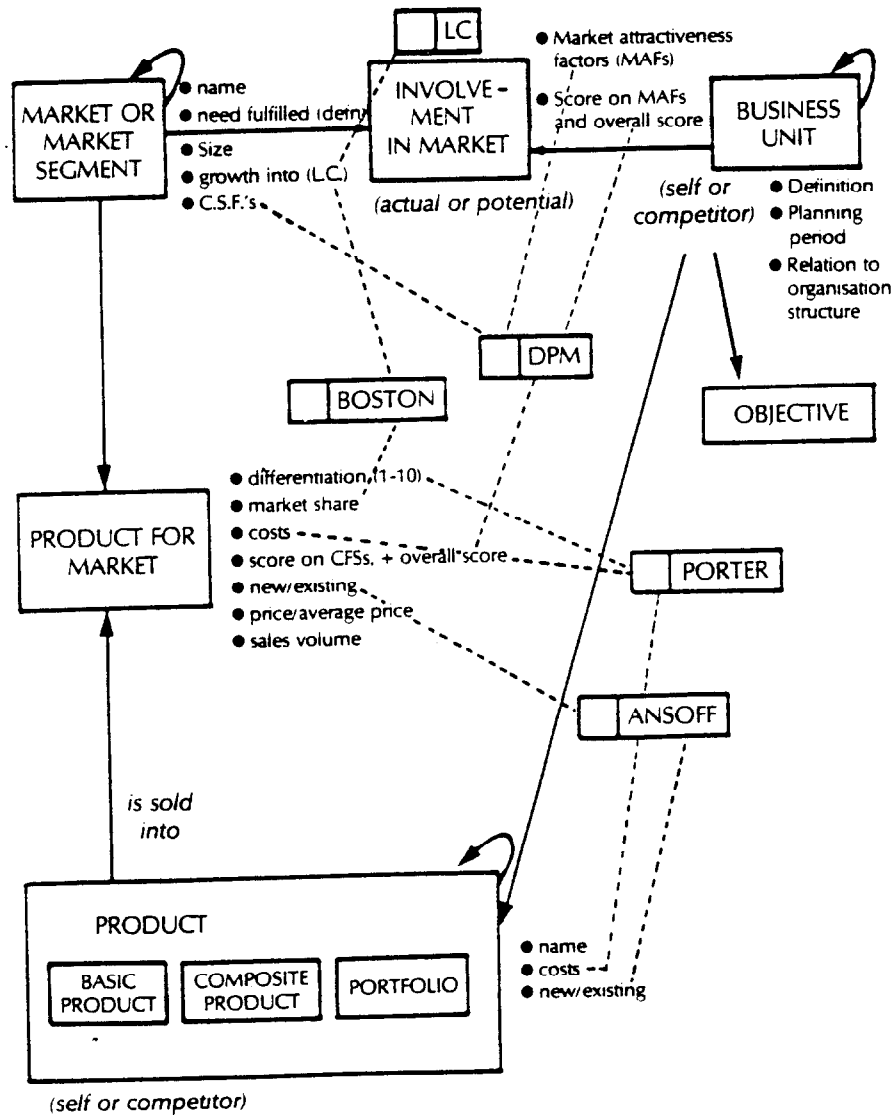
Figures 9 and 10 are attempts to indicate some of the connections between the actual techniques themselves. Whilst it is not necessary to take the reader through every one of these interconnections, it would be useful to highlight at least some of the main ones.

The Directional Policy Matrix can be seen to be a central tool in strategic marketing planning (Figure 9). Life Cycle Analysis will indicate the prospects in revenue/volume terms for the individual products/markets that are plotted on the vertical axis. The cost/experience curve of individual products/markets will provide valuable input to both the Boston Matrix and to the Porter cost/differentiation matrix, which will in turn help in determining the market attractiveness factors and critical success factors which are the basis of the Directional Policy Matrix.

The reader is advised to study these figures very carefully. This advice is given because the Expert System manages these interrelationships on the computer and users (typically marketing managers) do not have to concern themselves with them.

Figure 8 Technique Interrelationships

DATA USED BY TECHNIQUES
 The diagram below shows the data used as input by some of the techniques modelled.



On the other hand, if you are either a practising marketing manager or a marketing lecturer, you would be advised to devote some time to thinking firstly about the technical dimensions of the principal tools and techniques of marketing themselves, secondly about their specific applications, and thirdly about the interrelationships between these techniques in the process of solving of some of the more abiding problems of strategic marketing planning.

Figure 9 Technique Interrelationships (I)

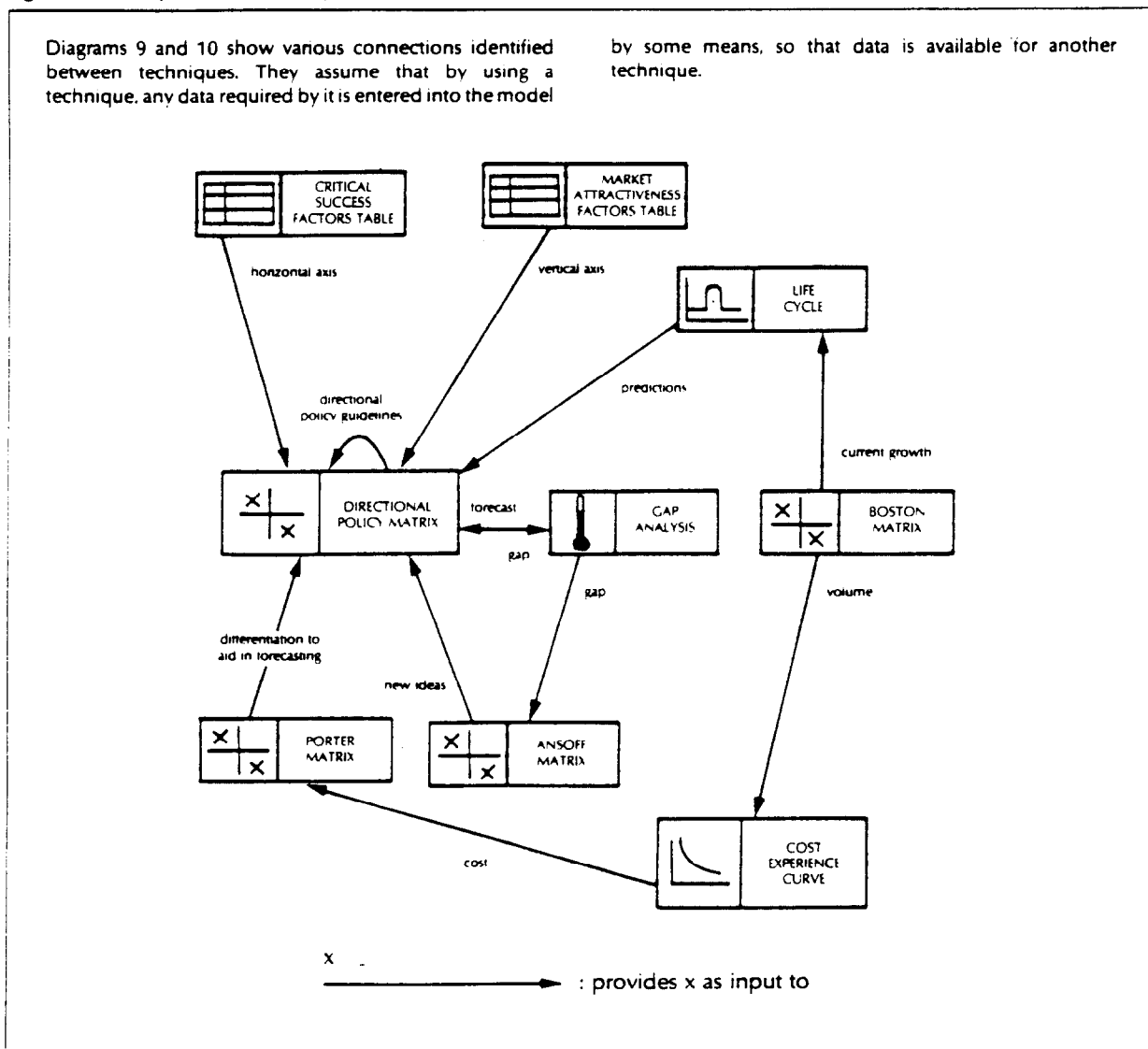
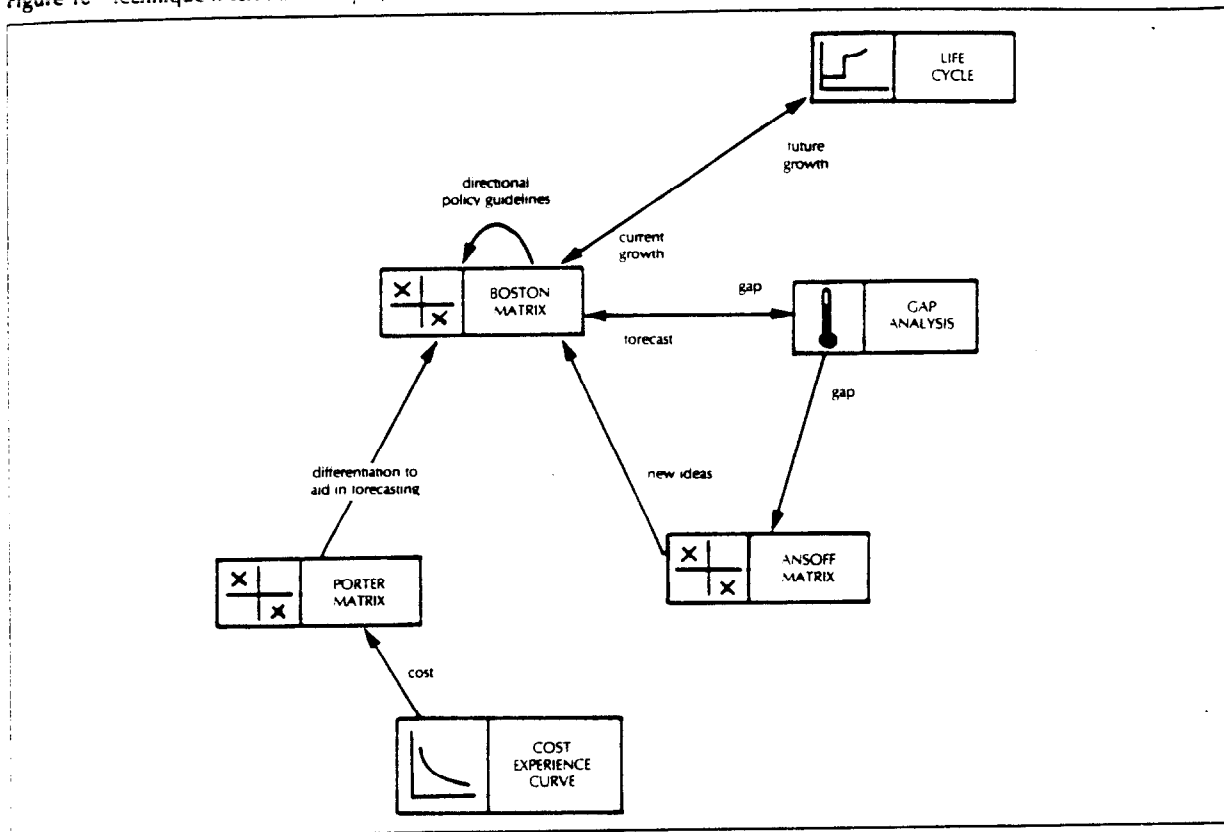


Figure 10 Technique interrelationships (II)



CONCLUSIONS REGARDING MARKETING TECHNIQUES

The only reasonable conclusions to reach from the foregoing are:

- i) practising managers must avail themselves of better education in the understanding of the application of marketing techniques to real world problems;
- ii) there are enough marketing techniques available already, without the need to seek out newer and even more sophisticated approaches;
- iii) the human mind is largely incapable of understanding and managing the complexities of the relationships between the many techniques of marketing;
- iv) in view of iii) above, expert systems will need to be developed so that these complexities are managed by the computer in a way which is helpful to practising managers in solving their complex problem.

In this section on marketing techniques, the underlying implication is that if the marketing 'champion' is the 'doctor', whose job is to bring the company back to health, then he would need to know not just about 'medicines' (the techniques), but about the 'patient' (the organisation).

The likelihood of there being a mis-match between the two bodes ill for the patient, yet in reality, that is what often happens.

It is easy to see why. All marketing techniques are essentially rational in their construction. In contrast, the organisation, made up as it is of people with all their human qualities and frailties, despite appearances, is often far from being rational.

The marketer is indeed very much like the physician described by Voltaire "He pours potions, about which he knows little, into people, about whom he knows even less."

In reality many of the barriers to marketing planning come from the organisation. It is as if its anti-bodies fight to prevent the marketing germ from catching hold.

ORGANISATIONAL BARRIERS TO STRATEGIC MARKETING PLANNING

1. A PREFERENCE FOR 'SHORT-TERMISM'.

A Chinese philosopher is quoted as saying "Even the longest journey must start with a single, small, step." It was never envisaged that the step itself constituted the whole trip, it was merely a temporary position en-route.

Unfortunately, many companies don't plan where they are going, they do the equivalent of taking one step, then look around before taking another. Sometimes, this journey is in the same direction, sometimes even backwards. Without having a destination to aim for, direction is relatively unimportant.

Nobody will claim that it is easy to identify one's long term strategic objective, say, three years hence. The task is made extra difficult by the turbulent times in which we live. Yet without doing this, the next one year step is likely to be irrelevant to the longer term interests of the Company.

It is easy to understand the appeal of short-termism. Most managers prefer to sell the products they find easiest to sell to those customers who offer the least line of resistance. By developing short-term, tactical marketing plans first and then extrapolating them, managers merely succeed in extrapolating their own short-comings. It is a bit like steering from the wake - O.K in calm, clear waters, but not so sensible in busy and choppy waters! Preoccupation with preparing a detailed one year plan first is typical of those many companies who confuse sales forecasting and budgeting with strategic marketing planning - in our experience the most common mistake of all.

Already, companies led by chief executives with a proactive orientation that stretches beyond the end of the current fiscal year have begun to show results visibly better than the old reactive companies with only a short-term vision.

Figure 10 shows the old style of company in which very little attention is paid to strategy by any level of management. It will be seen that lower levels of management do not get involved at all, whilst the directors spend most of their time on

operational/tactical issues.

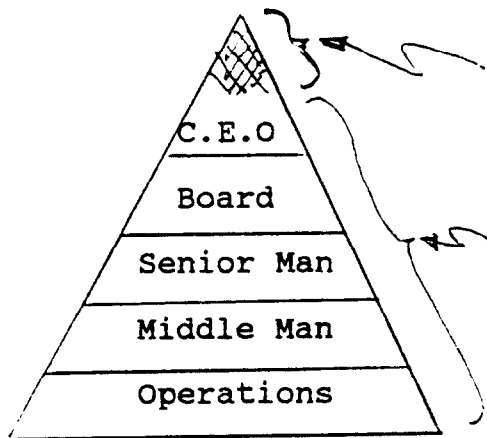


FIG. 10

Strategic Orientation

Tactical, short term orientation

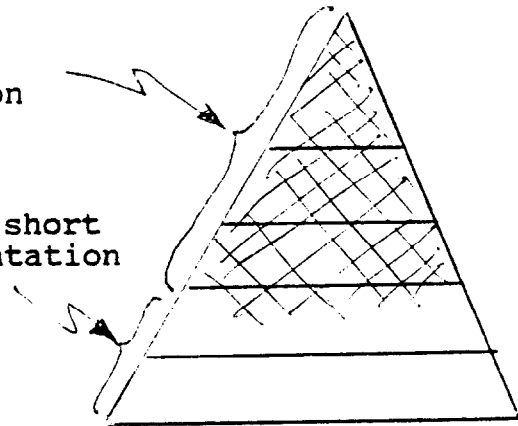


FIG. 11

Figure 11 shows another company with a similar management hierarchy. The difference between the two is striking. Here, instead of the strategic orientation just constituting a small part of the Chief Executive's job, many lower levels of management are also involved in strategy formulation.

The lesson to be learned is simple:

DEVELOP THE STRATEGIC MARKETING PLAN FIRST. THIS REQUIRES GREATER EMPHASIS ON SCANNING THE EXTERNAL ENVIRONMENT, THE EARLY IDENTIFICATION OF FORCES EMANATING FROM IT, AND DEVELOPING APPROPRIATE STRATEGIC RESPONSES. ALL LEVELS OF MANAGEMENT SHOULD BE INVOLVED IN THE PROCESS.

A STRATEGIC PLAN SHOULD COVER A PERIOD OF BETWEEN 3 AND 5 YEARS, ONLY WHEN THIS HAS BEEN DEVELOPED AND AGREED, SHOULD THE ONE YEAR OPERATIONAL PLAN BE PUT TOGETHER. NEVER WRITE THE ONE YEAR PLAN FIRST AND EXTRAPOLATE FROM IT.

2. ISOLATING THE MARKETING FUNCTION FROM OPERATIONS

One of the most common causes of the failure of marketing planning is the belief that marketing is something that a marketing person "does" in their office. The appointment of a marketing supremo is often a last-ditch attempt to put things right when all else has failed. The trouble is, the new person comes along and, irrespective of their knowledge or skills, quickly finds that all the power is vested in others, particularly for product development (the technical people), price (the accountants), customer service (the distribution department) and selling (the sales director). This leaves some bits of the promotional mix for the new person to play around with. Hence the new executive is powerless to influence anything of significance and quickly fails.

Line managers look on the new department with disdain and see requests for information, strategies and plans as a time-consuming task likely to have little impact on their real and more pressing problems.

This has much to do with the general misunderstanding about what marketing really is. Without a corporate driving force centred around customer satisfaction, (i.e. a marketing orientation), arguments about where to put marketing are of course pointless, but even when top management is jolted into a realisation of the need to take account of the customer, the most frequent mistake is to separate out marketing from operations as if it had the plague.

This is not the place to argue about organisational issues, such as line versus staff, centralisation versus decentralisation, although the principles are clear:

FOR THE PURPOSE OF MARKETING PLANNING, PUT MARKETING AS CLOSE AS POSSIBLE TO THE CUSTOMER. WHERE PRACTICABLE, HAVE BOTH MARKETING AND SALES REPORT TO THE SAME PERSON, WHO SHOULD NOT NORMALLY BE THE CHIEF EXECUTIVE OFFICER.

3. CONFUSION BETWEEN THE MARKETING FUNCTION AND THE MARKETING CONCEPT

The author's close contact with about 2,000 senior managers a year confirms his belief about the depth of ignorance that still abounds concerning what marketing it.

- a) Confusion with sales. One managing director aggressively announced to the assembled seminar audience "There's no time for marketing in my company 'til sales improve!" Confusion with sales is still one of the biggest barriers to overcome.
- b) Confusion with product management. The belief that all a company has to do is to produce a good product to succeed also still abounds, and neither Concorde, the EMI body-scanner, nor the many thousands of brilliant British products that have seen their owners or inventors go bankrupt, will convince such people otherwise.
- c) Confusion with advertising. This is another popular misconception and the annals of business are replete with examples such as Dunlop, Woolworths and British Airways who, before getting professional advertising management in, won awards with their 'brilliant' campaigns, whilst failing to deliver the goods. Throwing advertising expenditure at them, is still a very popular way of tackling deep-rooted marketing problems.
- d) Confusion with customer service. The "have a nice day" syndrome is currently having its hey day in many countries of the world, popularised of course by Peters and Waterman in "In Search of Excellence". The banks are amongst those

who have spent millions training their staff to be charming to customers whilst still getting the basic offer fundamentally wrong - the banks are still closed when the public most needs them open. Likewise, in British Rail, whilst it helps to be treated nicely, it is actually much more important for passengers to arrive on time.

The principle, then, is as follows:

MARKETING IS A MANAGEMENT PROCESS WHEREBY THE RESOURCES OF THE WHOLE ORGANISATION ARE UTILISED TO SATISFY THE NEEDS OF SELECTED CUSTOMER GROUPS IN ORDER TO ACHIEVE THE OBJECTIVES OF BOTH PARTIES. MARKETING, THEN, IS FIRST AND FOREMOST AN ATTITUDE OF MIND RATHER THAN A SERIES OF FUNCTIONAL ACTIVITIES.

4. STRUCTURAL BARRIERS

Closely linked with the issue of marketing powerlessness, is the issue of organisational form or structure.

The most typical organigram is the one which is based around corporate functions such as personnel, finance, production, distribution, operations, and marketing. Whilst the traditional reasons for this type of organisation are clear, there is little doubt that it can be very difficult to get people who are loyal to their own "tribe" to think of subjugating their own goals to the broader goals of customer satisfaction. This is clearly the role of top management and has a lot to do with corporate culture, to be discussed below.

Whilst the team building approach has gone a long way towards overcoming this kind of organisational barrier, of much more importance is to get the task of defining strategic business units (SBUs) right (The Strategic Planning Institute 1986).

A strategic business unit:

- * will have common segments and competitors for most of its products
- * is a competitor in an external market
- * is a discrete, separable and identifiable unit
- * will have a manager who has control over most of the areas critical to success

But SBUs are not necessarily the same as operating units, and the definition can, and should, be applied all the way down to a particular product of customer or group of products or customers, and it is here that the main marketing planning task lies.

The problem remains of getting organisational support and commitment to the marketing planning process, but this is discussed later.

ORGANISE COMPANY ACTIVITIES AROUND CUSTOMER GROUPS IF POSSIBLE RATHER THAN AROUND FUNCTIONAL ACTIVITIES AND GET MARKETING PLANNING DONE IN THESE STRATEGIC BUSINESS UNITS. WITHOUT EXCELLENT MARKETING PLANNING IN SBUS, CORPORATE MARKETING PLANNING WILL BE OF LIMITED VALUE.

5. LACK OF IN-DEPTH ANALYSIS

Even from well-respected companies, the most common complaint concerns lack of adequate information for the purpose of analysis. On deeper investigation, however, it nearly always turns out to be a case of too much information rather than too little. The real problem is frequent lack of proper analysis. At a recent conference for a builder's merchandising company that had increased its net profit before tax by 60% for the second year running, one of their chief executives did not know the answer to any of the following questions:

How much of the profit increase is due to:

- * market size growth?
- * market share growth?
- * price increases?
- * cost reductions?
- * productivity improvements?

Faced with such massive ignorance, it is clear what will happen to this company the moment construction industry trading conditions worsen.

The methodology for developing marketing intelligence systems has been comprehensively covered in the literature during the past twenty years, yet it is clear that in Britain at least, industry has a long way to go to get even the basics right concerning trends in:

- * the environment
- * markets
- * competitors
- * internal strengths and weaknesses

It is also clear that, even if an organisation has an adequate intelligence system, rarely is there a formal marketing audit undertaken by all SBU managers as a required activity at a specific time of the year as part of an agreed planning process.

The principle, then is as follows:

FOR AN EFFECTIVE MARKETING AUDIT TO TAKE PLACE:

- * CHECKLISTS OF QUESTIONS CUSTOMISED ACCORDING TO LEVEL IN THE ORGANISATION SHOULD BE AGREED
- * THESE SHOULD FORM THE BASIS OF THE ORGANISATION'S M.I.S.
- * THE MARKETING AUDIT SHOULD BE A REQUIRED ACTIVITY

* MANAGERS SHOULD NOT BE ALLOWED TO HIDE BEHIND VAGUE TERMS LIKE "POOR ECONOMIC CONDITIONS"

* MANAGERS SHOULD BE ENCOURAGED TO INCORPORATE THE TOOLS OF MARKETING IN THEIR AUDITS, E.G. PRODUCT LIFE CYCLES, PRODUCT PORTFOLIOS, AND THE LIKE

6. CONFUSION BETWEEN PROCESS AND OUTPUT

Confusion between the management process itself and the output of the process, the marketing plan, is common. In most cases, plans are too bulky to be of any practical use to busy line managers and most contain masses of data and information which rightly belongs in the company's marketing information system or audit, and whose inclusion in the marketing plan only serves to rob it of focus and impact.

The SWOT device (Strengths, Weaknesses, Opportunities and Threats), whilst potentially a very powerful analytical device to give impact to the ensuing assumptions, objectives, strategies and budgets, is rarely used effectively.

A SWOT Should:

- * Be focused on each specific segment of crucial importance to the organisation's future
- * Be a summary emanating from the marketing audit
- * Be brief, interesting and concise
- * Focus on key factors only
- * List differential strengths and weakness vis a vis competitors, focusing on competitive advantage
- * List key external opportunities and threats only
- * Identify and pin down the real issues. It should not be a list of unrelated points
- * The reader should be able to grasp instantly the main thrust of the business, even to the point of being able to write marketing objectives
- * Follow the implied question "which means that ..?" To get the real implications

This leads to a key point which needs to be made about this vital part of the marketing planning process.

INFORMATION IS THE FOUNDATION ON WHICH A MARKETING PLAN IS BUILT. FROM INFORMATION (INTERNAL AND EXTERNAL) COMES INTELLIGENCE. INTELLIGENCE DESCRIBES THE MARKETING PLAN, WHICH IS THE INTELLECTUALISATION OF HOW MANAGERS PERCEIVE THEIR OWN POSITION IN THEIR MARKETS RELATIVE TO THEIR COMPETITORS (WITH COMPETITIVE

ADVANTAGE ACCURATELY DEFINED - E.G. COST LEADER, DIFFERENTIATION, NICHE), WHAT OBJECTIVES THEY WANT TO ACHIEVE OVER SOME DESIGNATED PERIOD OF TIME, HOW THEY INTEND TO ACHIEVE THEIR OBJECTIVES (STRATEGIES), WHAT RESOURCES ARE REQUIRED, AND WITH WHAT RESULTS (BUDGET).

7. LACK OF KNOWLEDGE AND SKILLS

As we have seen, it is a matter of great disappointment to academics that many of the components of a typical marketing syllabus are rarely used by practising marketing managers, at least in industrial goods organisations. Indeed, in the author's experience, even experienced marketing managers with marketing qualifications often fail to apply the techniques of marketing in their jobs.

The perennial problems have always centred around customer behaviour and market segmentation, and indeed these are extremely difficult concepts to grasp even at the cognitive level. Even more worrying, however is the blind assumption often made by top management that all the key marketing practitioners in an organisation actually possess both the knowledge and the skills to be effective marketers.

The author has conducted a series of experiments in some of the UK's leading companies during the past two years, and has found that almost two-thirds of marketing practitioners do not know the difference between a corporate objective, a marketing objective, and an advertising objective. Even fewer know what a logarithmic scale is and how it can be used in experience curves and matrices. Very few have heard of the Standard Industrial Classification and virtually no one has heard of P.I.M.S. Very few even understand the significance of Benefit Analysis, let alone Benefit Segmentation. Out of fifty questions, the average score is about 20%.

Whilst these are only examples, and do not prove anything, it must be a matter of concern when thinking seriously about marketing planning, for without an understanding of at least some of the basic tools of marketing, the chance of coming up with strategies based on sustainable competitive advantage is slim.

Communication and interpersonal skills are also prerequisites for marketing planning success, since excellent marketing plans will be ineffective unless those on whom the main burden of implementation lies understand them and are highly motivated towards their achievement.

The principle then is:

ENSURE ALL THOSE RESPONSIBLE FOR MARKETING IN SBUS HAVE THE NECESSARY MARKETING KNOWLEDGE AND SKILLS FOR THE JOB. IN PARTICULAR, ENSURE THEY UNDERSTAND AND KNOW HOW TO USE THE MORE IMPORTANT TOOLS OF MARKETING, SUCH AS:

* INFORMATION

* HOW TO GET IT

- * HOW TO USE IT
- * POSITIONING
 - * MARKET SEGMENTATION
 - * ANSOFF
 - * PORTER
- * PRODUCT LIFE CYCLE ANALYSIS
 - * GAP ANALYSIS
- * PORTFOLIO MANAGEMENT
 - * BCG
 - * DIRECTIONAL POLICY MATRIX
- * 4 X Ps MANAGEMENT
 - * PRODUCT
 - * PRICE
 - * PLACE
 - * PROMOTION

ADDITIONALLY, MARKETING PERSONNEL REQUIRE COMMUNICATION AND INTERPERSONAL SKILLS.

8. LACK OF A SYSTEMATIC APPROACH TO MARKETING PLANNING

Gorb (1978) talks about the differences between a hunter and a farmer in planning requirements. A hunter travels light, and needs stealth, cunning and know-how, whereas a farmer needs to plan ahead, buy seed, sow, harvest, interpret demand for the crops, and so on. Clearly, then, at the entrepreneurial end of corporate development, marketing planning as a formalised system is not likely to be seen as relevant because of the "here and now" ethos.

Leppard (1987) discusses the different kinds of planning system that are required by organisations. These range from very informal systems to highly formalised ones, with the degree of autonomy at the top or bottom depending on the organisation's size and stage of development. He also devised an analytical tool for measuring an organisation's stage of development to ensure that any marketing planning system is appropriate.

The point here, however, is that for all but very small, undiversified organisations, a marketing planning system is essential to ensure that things happen when they are supposed to happen and that there are at least some basic standards which must be adhered to. In the author's experience even where training has been carried out, the quality and usefulness of SBU marketing plans are so variable as to make headquarters coordination into a central document an impossible task. This is largely due to the different levels of intellect and motivation of participating managers.

IT IS ESSENTIAL TO HAVE A SET OF WRITTEN PROCEDURES AND A WELL-ARGUED COMMON FORMAT FOR MARKETING PLANNING, THE PURPOSES OF SUCH A SYSTEM ARE:

1. TO ENSURE ALL KEY ISSUES ARE SYSTEMATICALLY CONSIDERED.
2. TO PULL TOGETHER THE ESSENTIAL ELEMENTS OF THE STRATEGIC

PLANNING OF EACH SBU IN A CONSISTENT MANNER.

3. TO HELP CORPORATE MANAGEMENT TO COMPARE DIVERSE BUSINESSES AND TO UNDERSTAND THE OVERALL CONDITION OF AND PROSPECTS FOR THE ORGANISATION.

9. FAILURE TO PRIORITISE OBJECTIVES

Even when organisations are successful in producing well reasoned marketing plans, it is not uncommon to find in each marketing plan as many as fifty objectives and many more strategies. This is because of the hierarchy effect of a principal marketing objective leading to a number of sub-objectives, which each of these sub-objectives leading to further sub-objectives. It is rare, however, to find any kind of prioritisation of these objectives, and even rarer to find any allocation of time resource to each. The result is that managers can, and do, get sucked into the day-to-day "In Tray" syndrome, which in turn results in the creeping non-implementation of the marketing plan.

The key role of senior management is to concentrate lower level management attention on factors that are both high leverage and actionable in order to get the essential jobs done effectively.

To prevent managers getting side tracked by trivia, the author has found that it is helpful to get managers to prioritise their next year's objectives using a time allocation planner. This is illustrated in Fig. 12.

	Minor			
		9	8	6
IMPACT	Significant	7	5	3
	Major	3	2	1
		LOW	MEDIUM	HIGH
		URGENCY		

<u>KEY : POSSIBLE TIME/RESOURCE ALLOCATION (%)</u>		
1 - 30	4 - 12	7 - 8
2 - 15	5 - 10	8 - 4
3 - 12	6 - 8	9 - 1
—	—	—
57	30	13
—	—	—

FIGURE 12 Objectives priority matrix

The principle then is as follows:

ENSURE THAT ALL OBJECTIVES ARE PRIORITISED ACCORDING TO THEIR IMPACT ON THE ORGANISATION AND THEIR URGENCY AND THAT RESOURCES ARE ALLOCATED ACCORDINGLY.

10. HOSTILE CORPORATE CULTURES

During the years 1985 and 1986, Leppard (op cit) carried out a research study to attempt to provide an explanation for the widespread corporate resistance to marketing planning. This showed that the acceptance of marketing planning is largely conditioned by the stage of development of the organisation and the behaviour of the corporate culture carriers. Thus it is that different modes of marketing planning became more appropriate at different phases of an organisation's life.

That organisations experience different phases of life as they grow and mature, and that each phase has a different 'life-force', can be explained briefly as follows.

Essentially, an organisation is a man-made product, and like all other products is subject to have a finite useful life cycle. Equally, the organisational life cycle can be extended, if it is managed astutely, just as with products or services. Therefore it is important to recognise when corrective action is required to renew the organisation, and the nature of the appropriate action to take.

All organisations start life because somebody had a 'good idea' and the wherewithal to bring it alive. Sometimes the business idea proves to be the proverbial lead balloon and doesn't get off the ground. However, with good fortune, a following wind and sensible management, the organisation can grow and thrive.

Indeed, its very success carries with it the seeds of destruction, because inevitably the organisation outgrows the capabilities of the entrepreneur who gave it birth and was the single 'big brain' running things. One day, an extra customer, an additional order, another machine in the factory, one extra employee, becomes the straw to break the camel's back. The

erstwhile busy owner manager becomes over-loaded and can no longer cope. As a result, the organisation stalls and can go into a tail-spin. (Fig. 13).

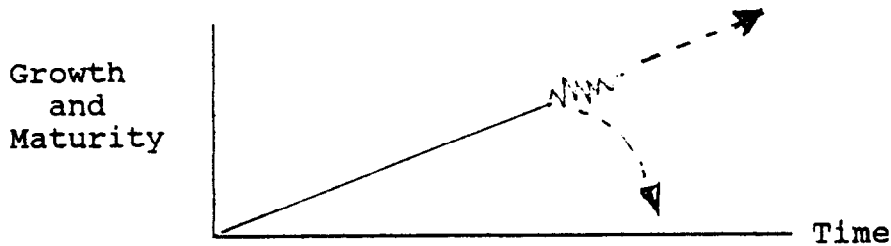


Fig. 13 - The developing organisation - the initial life phase

The solution to the problem would be for the owner-manager to take on some specialist staff and to delegate responsibility to them. However, for many entrepreneurs, to let go of even a single string is alien to them. They do not sit comfortably in a formally structured situation, deep-down many of them are just not organisational men. They are hunters, rather than farmers, a point that was made earlier.

So here we have an organisation which has enjoyed a relatively trouble-free period of evolutionary growth being confronted with a major crisis. What happens next? There are three possible outcomes:

1. The organisation fails
2. The owner-manager learns to change his operating style
3. A new strong leader appears on the scene

Either of the last two outcomes enable the organisation to extend its life cycle, but just as before, the next phase of evolutionary growth also brings with it the germ of the next crisis. In this way, an organisation's total life can be depicted as a series of evolutionary growth phases, interspersed with periodic crisis points, as shown in Fig. 12.

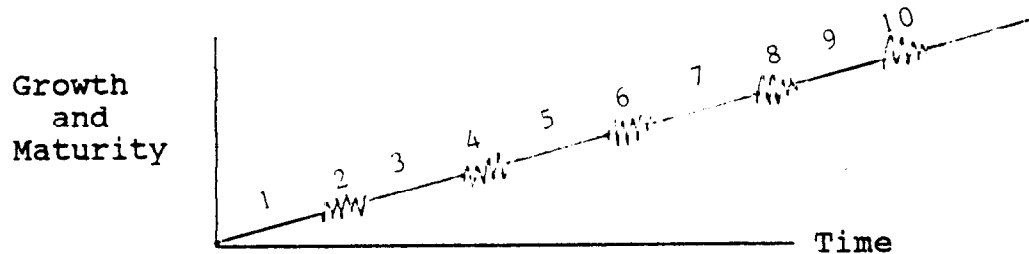


Fig. 14 Phases of Organisation Growth and Crisis

The numbers on the diagram are explained below.

- 1) The first evolutionary growth phase can be termed the organisation's 'creative evolution'. Its momentum is fuelled by the creativity behind the initial business idea, and the creative and flexible manner in which it responds to its business problems.

- 2) The first crisis is that of 'leadership', as we have seen.
- 3) The next evolution phase is bought about by a strong figure giving a 'directive' lead. This person clarifies who does what and creates order out of the chaos. He will set up rules and procedures and by doing so, alter the culture which was indigenous to the earlier phase.
- 4) The next crisis arrives when the directive leader no longer has the confidence of those working for him. As the organisation has grown, so have those in specialist positions grown in expertise. The sales people know more about customers than the chief executive, the technologists are more in touch with the latest developments, and so on.

The strong leader who could once give direction and maintain organisational momentum, no longer has credibility, he has lost touch. Thus the company is plunged into the 'autonomy crisis'. Whose hand should be on the tiller is the underlying issue.

- 5) The crisis is resolved by recognising that the company's expertise must be tapped. Thus more power and authority is delegated to key people throughout the organisation and a period of delegated growth ensues. Again, with the redistribution of power, the organisational culture changes in subtle ways.
- 6) As growth continues, those at the top of the organisation are discomfited by feelings that the organisation is getting out of control, the tail is wagging the dog, as it were. There is a crisis about who is really in control.
- 7) The resolution of this crisis comes about by establishing better co-ordination between those at the top and those at the bottom of the organisation. Again the intention is to harness all the strengths.
- 8) Unfortunately, attempts to improve co-ordination lead to a proliferation of systems and procedures which eventually become counter productive. Decision making is slowed down and people see themselves as subordinate to 'the system'. When this happens, the 'red tape', bureaucratic crisis phase has arrived.
- 9) The only solution, to offer a prospect of getting back on an evolutionary growth track, is to get rid of all the unnecessary trappings which have accumulated over the years. To rely more on open and spontaneous communications, for example, instead of memos written in triplicate, to recognise that it is people working together that achieve results, not impersonal systems.

In striving to achieve yet another culture change, the organisation moves into its collaborative evolution phase.

- 10) As we have seen, each period of evolutionary growth

eventually comes to an end, it seems (and this is only speculation) that the next crisis might occur because people 'over-collaborate', that is to say, lose the ability to make individual decisions without consultation, or perhaps some form of collective 'group think' loses touch with the environment within which the organisation operates. At present there is insufficient evidence to say with certainty what the next crisis, or what its succeeding evolutionary period will be. However, one thing is certain, human ingenuity will somehow prevail to extend the corporate life-cycle even further.

With this type of overview of how an organisation grows and develops, it is obvious that it is at its weakest during the crisis phases. An alternative strategy which is sometimes employed by organisations when they reach these critical points is to 'put the clock back'. Of course they cannot do this literally, but they can achieve an analogous result by divisionalising, or breaking the organisation down into smaller units. So, for example, an organisation at the red tape crisis might reason that when it was smaller, it didn't require all these systems and procedures to co-ordinate and control activities.

Sometimes such a move can be successful, but generally it only delays the inevitable. Continuing this example, managers who have adapted to a bureaucratic culture, often carry it with them into the smaller units. Perhaps the company only grows stronger in the long term by learning to overcome the crises as they arise.

The fact that some managers cannot easily let go of cultures that have served them well in periods of evolutionary growth, can sometimes explain why it is necessary to import a new chief executive at critical times. Perhaps there is a strong case to be made that you need the right kind of horses for the different (evolutionary growth) courses.

Can managers who have led a company down a particular path suddenly change track? Is it possible for frogs to become princes? Popular books would claim they can, because this is a much more optimistic message with which to sell copies. However, experienced practitioners and consultants would have some reservations.

If the business pressures on a company are great enough, intelligent behaviour will, of course win the day, as in the cases of British Airways and Woolworths, quoted earlier.

In the meantime, however, standardised, textbook type marketing planning cannot be imposed on all organisations with an equal chance of success, and most definitely not without the active support and participation of the culture leaders. Such participation must involve feeding back to those who have taken part in the process the total results of their efforts.

As a general rule, the marketing planning process should be

matched to the organisation life phases in this way.

- Creative Evolution - Marketing plans are generally absent, but a sales plan will be useful
- Directed Evolution - A systematic, top-down process will be most compatible with the corporate culture
- Delegation Evolution - A bottom-up marketing planning process
- Co-ordinated Evolution - A combination of top down, bottom up.
- Collaborative Evolution - A more imaginative, less bureaucratic approach, perhaps only planning around key products or markets (remember the 80:20 rule!)

The final principle then, is as follows:

MARKETING PLANNING WILL NOT BE EFFECTIVE WITHOUT THE ACTIVE SUPPORT AND PARTICIPATION OF THE CULTURE LEADERS. BUT EVEN WITH THEIR SUPPORT, THE TYPE OF MARKETING PLANNING HAS TO BE APPROPRIATE FOR THE PHASE OF THE ORGANISATIONAL LIFE LINE. THIS PHASE SHOULD BE MEASURED BEFORE ATTEMPTING TO INTRODUCE MARKETING PLANNING.

CONCLUSION

It will be understood from the foregoing that marketing planning never has been the simple step-by-step approach described so enthusiastically in most prescriptive texts and courses. The moment an organisation embarks on the marketing planning path, it can expect to encounter a number of complex organisational, attitudinal, process and cognitive problems which are likely to block progress. By being forewarned about these barriers, there is a good chance of doing excellent marketing planning that will bring all the claimed benefits including a significant impact on the bottom line through the creation of competitive advantage. If they are ignored, however marketing planning will remain the Cinderella of business management.

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