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2011-01-01

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Recommended Citation
Browne, S., Cuddihy, L.:Questioning the Currency of Marketing Planning Today. Irish Marketing Review (2011) ,Volume 21 Issue 1&2.

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QUESTIONING THE CURRENCY OF MARKETING PLANNING TODAY

Sarah Browne & Laura Cuddihy

While marketing planning has received considerable scholarly attention from academics, particularly on how it *should* be approached, extant research does not explicate in any great detail how this process is *actually* performed in practice. The limited existing empirical research suggests a lag between theory and practice in terms of marketing planning and strategy making. Therefore, in order to 'market' marketing in B2B organisations, and close this apparent academic–practitioner divide, a greater awareness of who is actually involved in marketing planning and strategy making processes is needed. The emphasis in this paper thus is to place the 'how' and 'who' in marketing planning under the empirical lens, and through practitioner insight, to propose a reconceptualisation of the marketing planning process as a flexible, adaptive and integrative process.

Getting a Handle on Marketing Planning

Plans are nothing, planning is everything.
Dwight D. Eisenhower

Effective marketing planning is commended as a process which guides a firm's marketing efforts by determining how to provide value to customers (Wood, 2007). There is little disagreement that effective formulation and implementation of the marketing plan will aid in achieving sound business performance (McDonald, 1996; Abratt, et al., 1994; Kotler, 1991; Stasch and Lanktree, 1980). However, a key trend emerging from the literature, and one which supports our position in this paper that marketing planning must evolve, is the inadequacy of traditional marketing planning thinking. It would appear that somewhere along the way, the misconception that planning formality is associated with planning effectiveness grew. Greenley, Hooley and Saunders (2002) claim that a chasm exists between what the classic marketing planning literature depicts as a logical, sequential decision making model (Leppard and McDonald, 1987) and the actual reality of marketing planning practice today. Critics of the traditionalist view have highlighted the need for innovation (Menon et al., 1999), flexibility (Greenley et al., 2002) and creativity (Slater et al., 2010) for effective marketing planning and strategy making, particularly in current turbulent times.

There are some who believe that developing the annual marketing plan is probably the single most important activity undertaken by marketing managers (Stasch and Lanktree, 1980; Kotler, 1991; McDonald, 1996). Various definitions exist of what marketing planning actually is. Traditionally, marketing planning is viewed as 'the structured process of determining how to provide value to customers, the organisation, and key stakeholders by researching and analyzing the current situation, including markets and customers' (Wood, 2007, p. 3) and is seen as a means of coping with the complexities facing practitioners in performing the marketing task (McDonald, 1996). However, the normative approach to planning has been criticised for its textbook formality and its failure to consider both the organisational and environmental context in which marketing takes place (Greenley, Hooley and Saunders, 2002). In fact, early empirical research has revealed that quite often most marketing planning is '... ad-hoc in nature, not very well formulated and is not integrated into a comprehensive whole' (Greenley, 2001). However, because marketing planning is believed to be the fundamental process through which organisations determine how to provide value to its customers, in theory it is fully integrated with the strategic orientation of firms. In practice however, this is not always the case (Brown, 2005). This discrepancy surrounding planning thinking poses a real threat to the survival of marketing as a function, and to overall business performance. This notable gap between theory and practice in marketing is now in danger of developing to a chasm (McCole, 2004) if not addressed.

Research Methodology

The findings presented here derive from a larger research project undertaken to explore the broadening boundaries of marketing in which cross-industry in-depth interviews were conducted with

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senior marketing executives, each with a minimum of five years' industry experience, and from both B2B and B2C companies. Each gave us an internal perspective of the idiosyncratic marketing planning process within their organisation. The semi-structured interview protocol and questions were designed adhering to the principles recommended for exploratory qualitative research. Because it was the authors' desire to make sense of and understand how these marketing executives perceive the marketing planning process within their organisation, qualitative interviewing was chosen as it is highly suited to research delving into complexities and processes, and trying to uncover why policy and practice are at odds (Marshall and Rossman, 1999). Because emerging research suggests that the marketing planning process is complex and involves numerous people and tasks, we used face-to-face interviews which enabled the authors to 'get inside the heads' of these marketing executives who could describe explicitly this complex and cross-functional task. For reasons of confidentiality, pseudonyms are given to all interviewees and the names of specific companies have been omitted. All interviews were transcribed verbatim and coded. The raw data was then organised using a technique of categorical indexing (Mason, 2002) which facilitated the emergence of several categories. The most prominent of these categories all had an underlying correlation with a broader-level theme, namely, the changing nature of marketing planning, and have prompted the writing of this article. The subsequent findings draw upon quotes and excerpts from the interview transcripts and give rise to further discussion.

Research Findings

A changing landscape

Emulating recent calls from marketing academics for a necessary move away from the outdated formal approaches to marketing planning, the empirical findings of this study confirm that marketing planning practice is indeed evolving. Respondents were asked to give a personal account of how they perceive their marketing planning efforts at present. The following excerpts underscore the sense of change taking place in marketing.

> Olive: You see, I think everybody at the moment is scrambling, you know? If you asked me that question a year ago it would have been a totally different answer ... but like now, you're doing well, you're not doing well, you're winning customers, you're losing customers, especially this year as we've taken a bit of a beating as has the whole market place.

The message being relayed here is that the recent downturn in the market has resulted in a noticeably different business environment. This unpredictable change in the market has happened over a relatively short period and respondents are of the opinion that things will continue to evolve and change, which has consequently left these managers 'scrambling' to make sense of the market and their resultant response. Slotegraff and Dickinson (2004) claim that it is essential that those involved in marketing planning have the skills to anticipate and respond to environmental changes. This increased pressure from changes in the external environment may almost force the marketers' hand in re-evaluating how to approach this challenging landscape and develop plans to react to these changes. Our findings underscore just how deeply the current economic climate and market downturn have influenced and altered marketing managers' perception of how they should approach their planning;

> Ryan: At the moment, marketing people are operating to the quarter. I think the definition of what strategic is and what tactical is has changed a lot over the last twelve to eighteen months. I think that will continue to change.

The above observation by Ryan highlights that issues that were once considered strategic or long term are now coming to the fore more rapidly than in previous years. A concern raised here is the practicality and relevance of an annual, pre-determined marketing plan, if in fact marketing people are 'operating to the quarter'. Our empirical findings lend support to Brown (2005) who points out the potential shortcomings or irrelevance of some of the long-established and widely used marketing theoretical tools, such as BCG and PLC, which are often used in developing long term marketing plans and strategies, especially when one considers the sheer unpredictability of the markets which these theories are designed to describe.

Flexibility as a prerequisite in marketing planning

Our findings raise a proverbial warning flag to management who may treat marketing planning

as a routine, annual write-up of overall marketing objectives. Amy states that the marketing plan needs to be more than just a written document in order for it to be of any real value or meaning.

> Amy: It's very good to have a structure but the marketing plan needs to be a live document. It cannot be something that you just write down seven thousand words and just stick into a filing cabinet and say that's great I have my marketing plan done for the year ... a little bit of flexibility and dynamics needs to be built into it as well.

Amy believes that when marketing planning is treated as routine, the result will most likely be a restrictive written document that is in danger of becoming irrelevant within the time it takes to formally write it up. Our findings serve to re-emphasise Pascale (1984), who argues that the existence of a plan on paper does not necessarily lead to a relevant strategy in practice because ultimately organisations operate in complex and dynamic environments which are difficult to predict.

Respondents were asked whether they could relate to the concept of marketing planning as a logical sequential process involving stages such as setting marketing objectives, creating marketing strategy, producing plan documentation, employing marketing tactics, setting a marketing budget and implementing and evaluating the plan (Leppard and McDonald, 1987). While most agreed on the importance of having some form of structure to their marketing planning, they believe a more flexible and adaptable approach to planning is what's required now.

> Cáit: I think that a company does always need a plan. I think it would be very unorganised and scatty if you didn't have something.

Cáit acknowledges the necessity of actually developing the marketing plan and likens having no form of marketing plan to 'going in blind-folded'. However, both Amy and Ryan focus more on *how* the marketing plan is developed as an issue of most concern for them. They reveal an air of cynicism towards the typical 'textbook' style approach to marketing planning and prefer a formal marketing plan but one that can facilitate an element of flexibility.

> Amy: The principles are great but the practice of what I suppose people are doing day to day has to be a lot more flexible and a lot more open to changing very quickly ... I don't follow that step by step process, it probably ends up covering most of the steps, maybe not in the same order.

> Ryan: I mean there would be a formal planning process but I mean it's a very, I would say, loose plan, where that plan goes can sometimes change. Obviously there is an actual formal plan there, and there is a lot of other stuff we would do almost subconsciously. A lot of marketing planning involves thinking on your feet, you have to be able to react to changes and move away from a plan if necessary.

Our findings provide empirical support for Smith's recent (2011, p. 27) conceptualisation of marketing strategy making and implementation as 'the interpretation, adoption and enactment of explicit resource allocation and activity decisions, at whatever point in the strategy process those decisions may occur'. Furthermore, Greenley, Hooley and Saunders (2002) propose a framework in which they outline key management processes designed to adopt flexibility in marketing planning decision making. In particular, these authors maintain that proactive and innovative management is crucial, and will lead to greater flexibility in marketing planning decision making which will in turn lead to greater adaptation to market opportunities. The findings of our research highlight that marketing practitioners are in fact taking a proactive stance and are open to a more flexible style of planning and 'thinking on their feet'. Marketing people are aware that flexibility in their planning is a necessity in order for them to keep up with the day to day running of their operations. One respondent, Ross, explains how his marketing department has begun to plan for the unplanned.

> Ross: We set aside a contingency budget in case a situation arises where if something does come along that we feel is really important, we can try and push it.

This 'contingency budget' is a practical mechanism utilised within Ross's company for facilitating the quick and flexible adaptation of the objectives of the original marketing plan. Evidently, there is aligned recognition between existing academic research and these practising marketers that flexibility is now a prerequisite in marketing planning. Further empirical research is now needed as the next step, to explore and identify

mechanisms through which management can embed flexibility into its marketing planning process.

Broadening the boundaries of marketing planning

Progressing marketing planning theory will require looking not only at the process itself but also the various people involved in adapting to emergent market changes, customer preferences and competitor moves. The theory of interaction depicts the company as a bond in an ever widening pattern of interactions (Ford, Hakansson and Johansson, 1986) and it is believed that strategic issues stem from such constant interactions among people (Gummesson, 1991). The term 'organisational learning' (Greenley, Hooley and Saunders, 2002) describes the process of gaining knowledge and insight into the experiences of others, and increased understanding though learning can improve marketing planning by building confidence among managers to formulate better options and to be bold in their decision making. Utilising this new knowledge through organisational learning greatly reduces the risk of managers simply committing to 'comfort zone strategies' (Johnston, 2009) that fit into their own world view and do not consider the 'whole picture' (Simkin, 2002).

Support for the inclusion of non-marketers from across the organisation's functional units in marketing strategy creation and implementation is growing within the marketing academic community (Krohmer et al., 2002). A recurring problem however is the failure to acknowledge fully the importance of cross-disciplinary input (Hackley, 2001) and the complexity of facilitating cross-functional input and influence into marketing strategy making. A study conducted by Simkin (2002) revealed that in practice over half of organisations surveyed failed to involve non-marketing personnel in their planning deliberations. The danger of this is that marketing can begin to take place in a 'black box' or marketing 'vacuum' (Porter, 1980), resulting in a 'broken chain' in the planning process (Gummesson, 1991). Amy is clearly aware of the criticality of including those outside the traditional marketing boundary. However, Olive and Ryan appear more apprehensive about the difficulty in practice of actually facilitating this integration efficiently.

> Amy: There's huge interaction between the different departments. When there's a [marketing] project on board, normally there's a meeting set up and the different stakeholders are at that meeting and that continues throughout the whole campaign. I think it's good to bounce ideas off people, sometimes you sort of feel that you're in a vacuum.
>
> Olive: When you have a lot of stakeholders involved, that means that it does kind of slow it down a little bit ... you could be months getting something around, and then by the time it's out, it could be slightly outdated.
>
> Ryan: I think marketing is the one area where people feel they can have an opinion and that's maybe something that annoys you ... you know if you're in finance, no one comes into you telling you how to re-jig the balance sheet you know? The broader you start expanding the circle, the more difficult it can be at times to get people to buy into things. But I do think if they are adding value to the process, by all means they should be involved but I'm not a great believer in dragging people in if they don't need to be there.

Marketing as a cross-functional effort and its associated positive impact on business performance (Krohmer et al., 2002) is widely accepted and had received considerable scholarly attention. Receiving much less attention, however, is the process of how cross-functional input can be facilitated without disrupting the flow of activity and decision-making and also what is the optimal level of interaction among these various functions before marketing management views their involvement as counter-productive. Our study highlights that a very real concern among marketing management is that too much involvement or input from everybody who has an opinion on marketing may be just as damaging as too little. Therefore we posit that how companies achieve a good balance when broadening their marketing boundaries is an interesting and relevant avenue for future marketing research and warrants further empirical investigation.

Sales and marketing integration in marketing planning

The marketing managers interviewed for this study conclude that that consideration of every opinion of all non-marketing colleagues in their planning deliberations is not viable. However, these managers are aware of the pitfalls associated with marketing taking place in a 'vacuum'. In fact, they have singled out a group of people tradition-

ally deemed as being outside the strategic decision-making boundary in marketing, namely sales personnel, as those who can potentially bring the most valued 'outside' knowledge and insight about how to meet customers' needs and expectations.

> Cait: In terms of whose opinion I would value, it would be the people who actually meet the customers every day and understand them, so it would be the sales people. I would definitely listen to the people who are meeting the customers first hand.

> Olive: We couldn't do our marketing planning without their [sales] input, you see they talk to the customers, we don't. If they're not on board then you might as well just talk to the wall because they are the ones that have to sell and then explain your promotion to the customers and so on, marketing is to get the message out there and sales is probably to deliver it in a specific way, so we're providing that two-way communication for them.

Both Olive and Cáit recognise that through their regular interactions with customers, their organisations sales teams have a greater understanding and deeper appreciation for what their customers want than they as marketers have. Also acknowledged is the impact that marketing and sales collaboration has on the marketing task by opening up communication flow between marketing, sales, the customer and the rest of the organisation. Olive indicates that without sales personnel 'on board' with efforts for new marketing initiatives, they are futile. While the data above shows that these marketing managers are aware of the need to get support from their sales counterparts, particularly in relation to customer knowledge and insight, further analysis of the data reveals a serious concern about the nature, extent and frequency of marketing's request for sales input into marketing planning:

> Ryan: I suppose the sales guys are involved ... they're involved indirectly and when they need to be. It's not a case of everyone getting involved at the beginning. I mean the people that need to be involved from the beginning are and then as other people need to be involved, they are ... I mean we wouldn't necessarily have a formal system in place and maybe it's something that we should have. Our [marketing] own activity is generally more planned, so a lot of the time it's not out of reluctance to co-ordinate better, it's just that there is practical issues when you actually try and do it.

> Cáit: I think there should be more of an official feedback plan because sometimes they [sales] tell me too late and the plan is gone ahead.

> Olive: I push them [sales personnel], I hound them for stories, I hound them for insight, I hound them for feedback [but] at the moment they are out there trying to keep customers so they don't have time to sit with us and tell us little stories and things like that.

It appears that Ryan and his marketing team continue to carry out the vast bulk of their marketing planning, particularly the 'beginning' phase of strategy creation, on their own and only look for 'indirect' sales personnel involvement, in the form of 'stories' from the field, and only when needed. However the danger in doing this is that by the time their input is listened to, accepted and incorporated into the marketing plan, it is too late, as outlined by Cáit. Failure to integrate and embed sales people fully into the entire marketing planning process leaves marketing managers like Olive chasing sales people, who are engaged more fully elsewhere, and 'hounding' them for their input.

Discussion

Existing research shows that sales 'buy-in' is one of the most crucial yet difficult parts of strategy execution and will only be achieved if greater involvement of sales in marketing strategy creation is facilitated (Malshe and Sohi, 2009). However, our empirical findings reveal that the reality of the situation is more a case of *input on request* as opposed to *real involvement and integration* of sales in the marketing planning process. Our findings reiterate extant empirical work which raises real concerns over the timing and inadequate quality of communication between personnel (Matthyssens and Johnston, 2006; Simkin 2002) which appear to remain top of the list of overriding problems in implementing marketing planning effectively and is perhaps why sales people feel excluded from marketing planning activities (LeMeunier-FitzHugh and Piercy, 2007; Piercy and Lane, 2009).

Recent work by Troilo et al. (2009) has found that increased dispersion of influence between marketing and sales on market-related decisions has a positive effect on the creation of superior customer value and diffusion of a customer-oriented culture. However, their findings revealed that

increased interaction between marketing and sales negatively impacts customer value. The question therefore must be how firms can overcome this paradox of effective dispersion of influence between marketing and sales, and excessive interaction between the two which has been found to be counterproductive and may lead to information overload and slow-down of decision-making. Our findings, in conjunction with new and emerging studies within the marketing and sales interface literature, are beginning to unearth the need for a greater understanding of the dynamic and complex nature of the marketing and sales relationship, the dispersion of influence between the two and the impact on strategic responsiveness to market change (Lyus et al., 2011) and superior customer value and market performance (Troilo et al., 2009). However, we have only scratched the surface. Malshe (2011, p. 45) calls for more qualitative empirical investigations which explore the 'dynamic factors' that may affect the role played by the already known linkages between sales and marketing.

Perhaps the reason for such a volume of interest in the sales and marketing interface is the tempestuous relationship between these two supposed close-working functional units. Furthermore, despite the 'not-so-friendly' interface (Dewsnap and Jobber, 2002), research indicates that effective marketing and sales integration is positively associated with business performance. This interface however is characterised by conflict, mutually negative stereotyping and non-cooperation (Malshe, 2011). Popular research issues therefore have focused for the most part on producing models for overcoming these barriers to integration (Rouziés et al., 2005), by creating linkages for enhanced collaboration (LeMeunier-Fitzhugh and Piercy, 2007) and better co-operation (Homburg and Jensen, 2008) between sales and marketing. While not detracting from the clear contribution these seminal works have made to our knowledge on the nature of the important working relationship between sales and marketing, and how it should be improved, we are of the same opinion as Malshe (2011), who calls attention to the fact that extant research on the sales–marketing interface is mostly conceptual, descriptive and focuses on producing models depicting language, structure and process as dimensions of sales and marketing linkages, with a few notable exceptions (Rouziés et al., 2005). Our empirical findings therefore, make some contribution to a deeper understanding of the necessity, yet difficulty in practice, of first selectively broadening the boundaries of marketing to include other functional units that can add value to the marketing planning process. And secondly, we highlight the need for empirical work that investigates how to get the correct balance in the dispersion of influence across all functions in marketing strategy creation and implementation.

Most recent work regarding the marketing and sales interface found that 'vertical and horizontal communication bridges' across intra-organisational boundaries and interpersonal relationships are dynamic factors essential in forging stronger connections between sales and marketing (Malshe, 2011). Furthermore, the boundary-spanning literature depicts sales personnel as the prototypical boundary spanner (Lysonski and Johnson, 1983), acting as a communication bridge between organisation and environment (Aldrich and Herker, 1977). Furthermore, through their customer-facing activities and deciphering 'what counts', sales personnel become 'market shapers' (Geiger and Finch, 2009). And finally, a new and emerging body of work within the marketing academic community suggests that interacting with the customer in value creation through 'interactivity, integration, customization and co-production' is at the core of the 'service-centered view' and is considered the new dominant logic for marketing (Vargo and Lusch, 2004) because customers today, particularly in B2B, are attaching increasing importance to the interaction approach of supplier organisations (Rangarajan et al., 2004). Rust et al. (2010: 96) explain: 'Never before have customers expected to interact so deeply with companies to shape the products and services they use' and in order compete in this aggressively interactive environment, focus must be shifted from 'driving transactions to maximising customer lifetime value'. In other words, doing things not just for the customer but also in concert with the customer (Vargo and Lusch, 2004) and integrating the voice of the market with the voice of the enterprise (Gummesson, 2002). This customer-focused orientation is now recognised as critical for sustaining competitive advantage. Therefore, we agree with Gronroos' (2011) latest assessment that value creation and marketing turn out to be

intertwined and that interaction is a defining characteristic of the service dominant logic.

However, some current thinking suggests that marketing mainly operates as a 'promise-making process' (Brown, 2005, p. 3). By conceptually linking the three key steams of literature of sales and marketing integration, boundary spanning and value co-creation, we position marketing planning as a promise-keeping and loyalty-creating (Gronroos, 2011) integrative process. We posit that through their boundary spanning role, sales personnel are the key mechanism of interaction between customer and marketing and therefore must be fully involved throughout the entire marketing planning process. The rationale behind such a proposition stems from fundamental work in organisation theory. Daft and Weick (1984) view the organisation as a 'central nervous system' through which interpretations about the market place are made in order to discover what consumers want that other organisations do not provide. We propose sales people in a boundary spanning role as the 'sensory organs' (Organ, 1971) of organisations because through their close proximity to the customer, these individuals are adept at establishing 'what counts' for the customer and therefore actually shape market opportunities (Geiger and Finch, 2009), giving their company a sustainable competitive advantage in their marketing planning capabilities. We feel we have made a solid argument for the potential mediating role boundary spanning sales personnel can play in addressing the concerns raised by the marketing managers in our study about the difficulties in broadening the boundaries of marketing planning and incorporating outside perspectives more effectively. We hope we have contributed in some way to the pursuit of the 'desired boundary-less firm' in which 'the capability set of a firm is broadened through access to external competences and new ideas for value creation' (Johnston, 2009, p. 141).

Conclusion

McCole (2004, p. 531) claims that 'marketing is in a mid-life crisis and it is high time that we realigned both the function and the concept to reflect real-life marketing outside of the ivory tower'. We highlight the evolution currently taking place in marketing planning practice in which marketing managers are cognisant of the fact that marketing planning must become more open, flexible and integrative. However, as in many disciplines, there appears to be a lag between current practice and theoretical developments. Our empirical findings leave us in little doubt that earlier definitions of marketing planning are too insular. We make a contribution to knowledge by conceptually linking various sub-streams of emerging marketing literature, sales and marketing integration, boundary spanning and value co-creation and depicting marketing planning as an integrative and customer-oriented process.

Further empirical research is now needed to understand more deeply these dynamic aspects of the sales and marketing interface. We hope our research has contributed in some small way to taking marketing down from its so-called ivory tower. Because this is a time of discontinuous change in business, strategy formulation should empower and encourage a firm to enact its own future and adapt with the environment (Johnston, 2009). Therefore, we feel that research which explores the role of boundary spanning salespeople and their value co-creating and market-shaping capabilities in developing emergent and relevant marketing planning will help marketing management create better strategies and enact their own future. Research of this nature may quieten those who voice criticism of the currency and relevance of current planning thinking and help to bring marketing planning theory in line with practice in today's turbulent and challenging market environment.

Authors

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