

A NEW PRESCRIPTION FOR CREATIVE MARKETING PLANNING

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ABSTRACT

In times of great changes, marketing planners have a great need for creativity in developing alternatives for achieving their goals. This paper offers a prescription for marketing planning based in part on a widely used text and in part on a creative approach drawn from another discipline, strategic planning.

INTRODUCTION

In times of great changes marketing planners need all the goal targeted creativity they can muster in to exploit new opportunities and defend against new threats. Yet, when we examine a leading prescription for marketing planning (Kotler 1991 pages 73 to 79), creativity is *not even mentioned* in the context of planning.

This problem in marketing planning was recognized by Nylen (1990), as well as another important problem: ". . . the approach must recognize that frequently neither the problem-definition or the alternatives are 'given,' but must be formulated by the decision-maker."

In strategic planning, the situation is different. Winer (1983), has offered a logical process for identifying and ranking objectives hierarchically and for generating and evaluating many goal-targeted strategies before selecting the mix of strategies to be implemented.

This paper presents a merger of Kotler's structure with the steps developed by Winer. The resulting marketing planning process covers all the aspects of Marketing and ranks objectives logically and develops many goal-targeted strategies, as well. This new process is outlined below. Sections that differ substantially from the Kotler structure are presented in italics. Detailed instruction for the italicized sections are presented following the outline, with the discussion keyed to the italicized sections.

This process has been used in teaching Marketing courses and in consulting work. In every instance, dozens of goal-targeted Marketing strategies were developed, some obvious and some not at all obvious. Some of the less obvious strategies were judged by

participants in the process to be superior to the obvious ones.

THE CREATIVE MARKETING PLAN OUTLINE

I. Summary. Highlights of the marketing plan.

- A. Recommended objectives.
- B. Recommended strategies.
- C. Financial projections.
- D. Contingency plans.

II. Current Marketing Situation.

- A. Market: size, growth rates, geography.
- B. Product: sales volumes, prices, margins, promotion, net profit for each major product line.
- C. Competition: size, goals, market shares, product quality, prices, promotion.
- D. Distribution: volumes and trends of wholesalers and retailers.
- E. Macroenvironment: demographic, economic, technological, political, social and cultural trends that have a bearing on the product line.

III. Current Objectives and Strategies.

- A. List marketing objectives and strategies.
 1. What is the company trying to achieve?
 2. What is the Marketing Department trying to achieve?
 3. How is the Marketing Department trying to achieve its objectives? What strategies and tactics are they using?
- B. Rank objectives and strategies by asking the questions: "Why?" and "How?"
- C. Identify the Top Rank Objective (TRO) for the product or service.

IV. Issue Analysis (SWATs). With respect to the Top Rank Objective, list:

- A. Strengths - company attributes that help to achieve the the TRO.
- B. Weaknesses - company attributes that hinder achieving the TRO.
- C. Auspicious conditions - outside conditions that help to achieve the TRO.
- D. Threats - outside conditions that hinder achieving the TRO.

V. *Recommended Objective. Considering the SWATs, is the TRO attainable? If yes, continue. If not, go back and select a different TRO.*

VI. *Create many alternatives by answering these four questions, many times: How can we . . .*

- A. *Use each Strength?*
- B. *Stop each Weakness?*
- C. *Exploit each Auspicious Condition?*
- D. *Defend against each Threat?*

VII. *System of Strategies and Tactics (SST).*

VIII. *Recommended Strategies and Action Programs.*

- A. Target market(s).
- B. Positioning statement.
- C. Product characteristics and innovations.
- D. Pricing to consumers and channels.
- E. Distribution channels: wholesale, retail.
- F. Personal selling: recruiting, training, quotas, motivation, measurement, compensation.
- G. Service support: repairs, hot line(s).
- H. Advertising: target audience, media, themes and messages, budgets, measurement and evaluation, co-op advertising.
- I. Sales promotion: brochures, trade shows, point of sale displays, incentives to dealers.
- J. Direct response marketing: print, radio, TV, mail, telephone.
- K. Public relations.
- L. Product development.
- M. Marketing research.

IX. *Financial Projections.*

- A. Sales and profits for the next three years.
- B. Break-even analysis.

X. *Controls: what will be measured.*

XI. *Contingency Plans. Strategies to be used if planned results are not achieved.*

INSTRUCTIONS FOR THE ITALICIZED SECTIONS

III A. *List Current Marketing Objectives and Strategies*

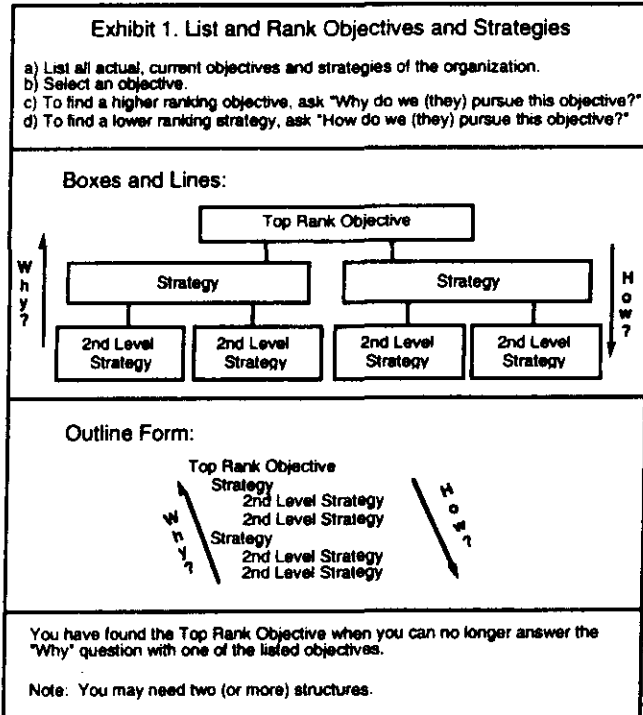
As you consider the situation, list all the current Marketing objectives and strategies of the company.

III B & C. *Rank Objectives and Strategies and Identify the Top Rank Objective*

The next step is to discover the Top Rank Objective (TRO) of Marketing. All the other objectives are ways

of achieving the TRO. You may think of them as strategies. This is how you find the Top Rank Objective:

Select an objective that *seems* to be the TRO. Draw a box and write in this objective. See **Exhibit 1**.



Then ask: "Why is the company pursuing this objective?" Look for an answer in the list that you made up. If you find an answer to the question, draw another box above the first box and write in the higher ranking objective. Connect the boxes with a vertical line. Ask the "Why?" question about the new top objective and repeat the same steps. Keep asking "Why?" and drawing and filling in boxes until you can't find an answer to the question. The objective in the top box is the Top Rank Objective (TRO).

Ask the question "How are they pursuing this objective?" to place properly the other objectives and strategies that you listed earlier. When you finish this step, you should have a logical hierarchy of the objectives and strategies of Marketing. You can do the ranking faster with a personal computer running a word-processor or an outline editing program

Note A: In doing the ranking, use only the objectives and strategies that you listed in Step III. You are explaining what Marketing is doing. You are not yet advising them how to do better. That comes later.

Note B: In some instances, you can't fit all the objectives and strategies into one logical structure. Then you must develop two (or more) sets of boxes and lines (or outlines).

IV. Issue Analysis (SWATs)

The next step is to discover the Strengths, Weaknesses, Auspicious Conditions and Threats (SWATs) that apply to the Top Rank Objective.

Note C: If the bulk of your concerns deal with a lower ranking objective, select that lower ranking objective for the SWAT discovery.

Follow these definitions when you list the SWATs:

Strengths = attributes of the company that *help* to achieve the TRO.

Weaknesses = attributes of the company *harmful* to achieving the TRO.

Auspicious Conditions = outside conditions that *help* to achieve the TRO.

Threats = outside conditions *harmful* to achieving the TRO.

V. Recommended Objective

Ask this question: "In view of the SWATs, can Marketing achieve their TRO?" Use your judgment. If you judge the Strengths and Auspicious Conditions to be greater than the Weaknesses and Threats, say "Yes" and continue to Step VI. If the opposite is true, say "No" and go back to Step III and choose another objective and then do another SWAT discovery on the new objective.

If you were working with two or more TRO's (**Note B**, above), you have to decide now which objective(s) the company should pursue in view of the SWATs.

VI. Alternative Strategies

Create many strategies, so that you have a chance of finding some really good ones. Ask these four questions, repeatedly:

1. How can we Use each Strength?
2. How can we Stop each Weakness?
3. How can we Exploit each Auspicious Condition?
4. How can we Defend against each Threat?

Concentrate on the important Strengths, the ones that differentiate this company from its competitors.

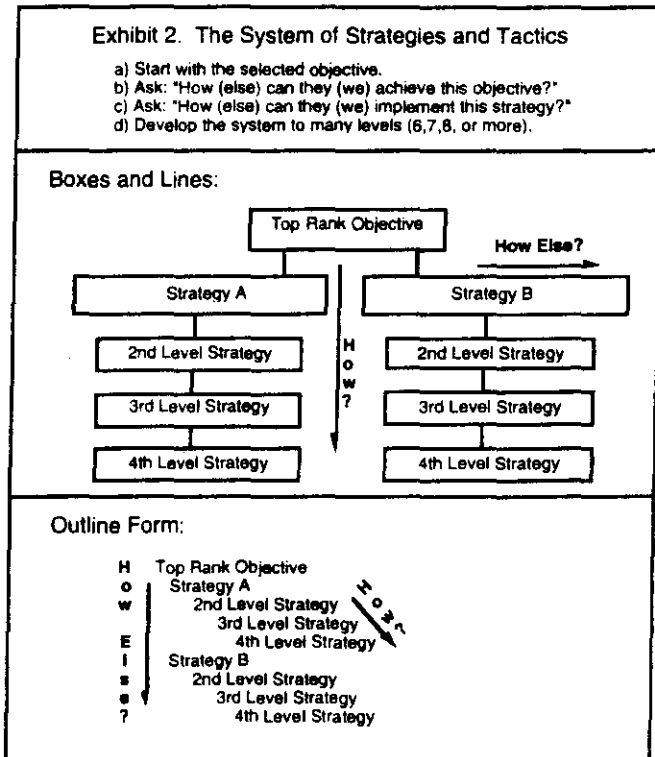
Also make sure not to overlook the really dangerous Weaknesses and Threats that might destroy the company.

Note D: Deriving strategies from SWATs is structured brainstorming. Therefore, observe brainstorming customs. Encourage creativity. "Piggybacking" on one another's ideas is allowed. Postpone all criticisms to a later phase.

VII. System of Strategies and Tactics (SST)

This is yet another way of being creative. With respect to the TRO, you ask "How (and how else) can we achieve this objective?"

To create a System of Strategies and Tactics (SST), start at the top with a box that has the TRO written in it. See **Exhibit 2**.



Then, in answer to the question: "How can we achieve this objective?" show, in boxes, the best strategies that you developed in Step VI. Then ask the "How else?" question to develop some new strategies. Keep asking "How else?" as long as it's productive.

Note E: The new strategies must be supported by Strengths or Auspicious Conditions in the SWAT table.

Next, develop the tactics and actions needed by asking this question: "How can we implement this strategy (or this tactic)?" Carry this activity to many levels, to get a good understanding of what's needed to implement each strategy. Keep asking "How?" and "How else?"

As you develop your System of Strategies and Tactics, you may wonder about the labels to attach to the lower levels. The best answer is to simply number them as second level, third level, etc. strategies, rather than try to assign labels.

After you have developed a wide and deep SST, examine it. Structurally, it is the same as the ranking of objectives and strategies that you did in Step III. The difference is that the new structure is larger and richer because it is the result of your analysis and creativity.

Next, choose the most promising strategies and develop Action Programs.

VIII. Action Programs

Each Action Program discusses in some detail the following topics:

1. Name of the strategy.
2. Specific benefits to the company of implementing this program.
3. Actions: What will be done.
4. Responsible Persons: Who will be in charge of implementing the program.
5. Timing: When will the program start. When will it be completed.
6. Location(s): Where will the program be implemented.
7. Resources: What will be needed: people, money, other resources.
8. Control system: How will progress be measured and reported.
9. Rewards for performance, if any.
10. Contingency plans: What will be done if results fall short.

Evaluate each Action Program. Consider the following questions:

- a) Are the required resources available?
- b) What risks or bad side effects are involved?
- c) Is there a better way of achieving the results?
- d) Do the Action Programs reinforce each other?

You should recommend all the Programs that survive this evaluation.

Monitoring Implementation

Two types of monitoring are required: results and assumptions. Results are usually monitored through the control system that should be in place in every well-managed company: sales, market share, costs, expenses, profits and the like. It is possible that specific action programs will require additional monitoring systems. Actual results are compared to expected results, and if a sufficient variance is found, consideration is given to the contingency plans prepared previously.

The second type of monitoring has to do with the initial assumptions about the SWATs. Attributes of the company and outside conditions may change. If the SWATs have changed sufficiently, the whole analytical and creative process has to be repeated to make sure that the programs being implemented are still best, in view of the changed SWATs.

CONCLUSION

A Marketing planning process was described above that in academic and business applications has resulted in the creation of many alternative strategies. The process itself, starting with the Top Rank Objective (TRO), discovering the factors (the SWATs) that affect achievement of the TRO and deriving strategies from the SWATs assures that the strategies have a bearing on the TRO.

Future research should focus on side-by-side planning situations, some using the traditional approach and some using the creative approach proposed here and having a panel of experts appraise the quality of the resulting Marketing plans.

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