

Strategic Marketing Planning Process under a Network Approach

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Summary

Marketing literature shows that the main sequences of strategic marketing planning and control processes do not have a strong network approach, since these sequences consider the company in a more individual approach. This article presents a new sequence of steps, which was applied as a Strategic Marketing Planning and Control framework in three companies and incrementally adjusted over a period of three years based on the observed results in three companies. This approach differs from other planning proposals in that it views the firm as part of a production network and it makes active use of inter-firm relationships and collective action tools in designing marketing activities. Many collective actions can be undertaken by firms that operate in the same markets, as competitors or as suppliers of complementary products. This research revealed a considerable desire among the firms to act jointly in their marketing actions.

Key Words: marketing, marketing planning, networks, collective actions

1 – Introduction: A Space for Adjustments in the Marketing Planning Sequences

In response to changes brought about by the globalization of markets, firms and the marketing function have expanded their activities. Markets in some cases do not have frontiers and firms are specializing in core businesses, demanding international contractual relations, either to obtain their inputs or to distribute their products and services. Real networks are being developed, focusing on relationships and continuous and sustainable development (Heide & Miner, 1992; Hertz & Mattson, 2001; Noonan, 1999; Ross et al., 1997; Webster, 1992).

Several joint supply chain activities (backwards in the company's network) are taking place. Buying groups are joining companies such as Fiat and General Motors, Carrefour and others. At the same time, forward in the companies' activities, cooperative-marketing actions are also receiving increasing attention and have been more and more defended by marketing executives and academics (Biong et al. 1997; Blois, 1997; Bucklin & Sengupta, 1993; Heydebreck & Maier, 1997; Gemunden & Ritter et al. 1997). Cooperation may be vertical in a network (between players of technologically distinct stages – e.g.: suppliers and distributors), as well as horizontal, involving competitors and even firms supplying complementary products to the same target-market (Gemunden & Ritter, 1997; Gulati, 1998).

When analyzing models already proposed in the literature for marketing planning and control processes (Las Casas, 1999; McDonald, 2002; Westwood, 1995; Cooper & Lane, 1997; Campomar, 1982), it can be noticed that they do not have a strong network approach. In other words, the firm is not viewed within a network, where it has suppliers for products it needs, as well as marketing

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channels and competitors. At a time when partnerships, alliances and other forms or “arrangements” are gaining importance, and with compressed margins, it is necessary to adapt the existing models to cover the design and management of collective action as formal objectives of a firm.

2 – Objectives

The research presented in this article had two central objectives:

- To design a sequence for the strategic marketing planning process that involves a strong network approach;
- To verify whether the proposed sequence is applicable and whether companies would like to perform common marketing activities.

3 – Methods

To accomplish these objectives, the following research methods were used:

- To design a new sequence, a literature review on existing marketing planning and control models (Section 4) was made and research was conducted in marketing plans implemented in three companies, (Section 5). The results of these companies over a period of three years were analyzed in-depth by the author. These processes made it possible to optimize the sequence, which is elaborated in this paper (in Section 6).
- To verify whether the proposed sequence is applicable and whether the idea of common activities is accepted by companies, a structured workshop was held with the marketing directors of ten non-competitor companies that operate in the same target-market. During this workshop, the sequence was submitted to the directors, who discussed and evaluated it. The participants tried to set up a common agenda of marketing initiatives, and also to predict what problems could threaten their potential alliance and how these threats could be avoided (Section 7). During the workshop, the participants were also asked to complete individual questionnaires, containing open multiple choice questions (Malhotra, 1996). The participants were asked:
 - whether their companies performed the marketing activities proposed in the sequence;
 - to evaluate (on a scale of 0 to 10) the importance of these marketing activities for their own companies;
 - to evaluate (on a scale of 0 to 10) how much they believed the companies would gain by performing these activities together;
 - to evaluate (on a scale of 0 to 10) the desire of their own companies to participate in the joint activities, and thereby their commitment to collective actions.

Most of these marketing directors belong to multinational firms in the agribusiness sector that supply to beef or milk producers. These companies are not direct competitors (they included for example one fertilizer company, one producer of supplements, one medicine supplier, genetics supplier, infra-structure and others). Table 1 summarizes in chronological sequence the objectives and methods of this research.

Table 1 - Objectives and research methods used:

1	UNDERSTAND MARKETING PLANNING SEQUENCES/NETWORKS (DESK RESEARCH/LITERATURE REVIEW)
2	DEVELOP A SEQUENCE FOR MARKETING PLANNING USING A NETWORK APPROACH
3	APPLY THIS SEQUENCE IN THREE COMPANIES (OVER A PERIOD OF 3 YEARS – CASE STUDIES)
4	IMPROVE THE PROPOSED SEQUENCE(DESK RESEARCH)
5	SUBMIT THE SEQUENCE TO VERIFY APPLICABILITY IN 10 COMPANIES (WORKSHOP)
6	PROPOSE LIST OF MARKETING ACTIVITIES (WORKSHOP)
7	PROPOSE LIST OF ACTIVITIES THAT COMPANIES COULD PERFORM TOGETHER (WORKSHOP)
8	COMPILE LIST OF ACTIVITIES THAT COMPANIES WANT TO PERFORM TOGETHER (WORKSHOP)
9	RAISE POSSIBLE PROBLEMS THAT CAN ARISE AND CONSIDER HOW TO DEAL WITH THEM (WORKSHOP)

4 – Literature Review

4.1 - Marketing Planning and Control Models

Some of the models proposed by authors for marketing planning and control are shown in Table 2. They are not discussed in detail, since they are well known and commonly used by scholars and businesses. The main objective of the table is to give a general overview of the various approaches and to indicate the steps involved in each of them.

Table 2 – Some sequences proposed in the literature for the marketing planning and control process

Westwood	Las Casas	Kotler	Cooper & Lane	McDonald	Campomar
Set corporate objectives	External data	Executive summary	Present position	Mission	Internal and external situation analysis
External marketing research	Internal data	Current marketing situation	Internal audit	Objectives	Objectives
Internal marketing research	Determine future development	Opportunity analysis	External audit	Marketing audit	Action program restructuring
Weaknesses and strengths, threats and opportunities analysis	Objectives and goals	Goals	Marketing mix strategies	Weaknesses and strengths, threats and opportunities analysis	Segmentation Positioning Pricing
Marketing objectives and expected results	Marketing strategies and budgeting	Marketing strategy	Objectives	Assumed conditions	Promotion
Develop marketing strategies and action plan	Gains and losses projection	Action program	Marketing plan preparation	Marketing objectives and strategies	Product Point of Sale
Programs that include advertising and promotion plans	Control	Results demonstration	Monitoring and revision	Expected Results	Expected marketing margin Scheduling
Budgeting		Control		Alternative Plans	Control
Write down the plan				Budgeting	
Plan communication				Implementation plan	
Control system of the plan					
Plan revision and updating					

4.2 – Network Approach in Marketing

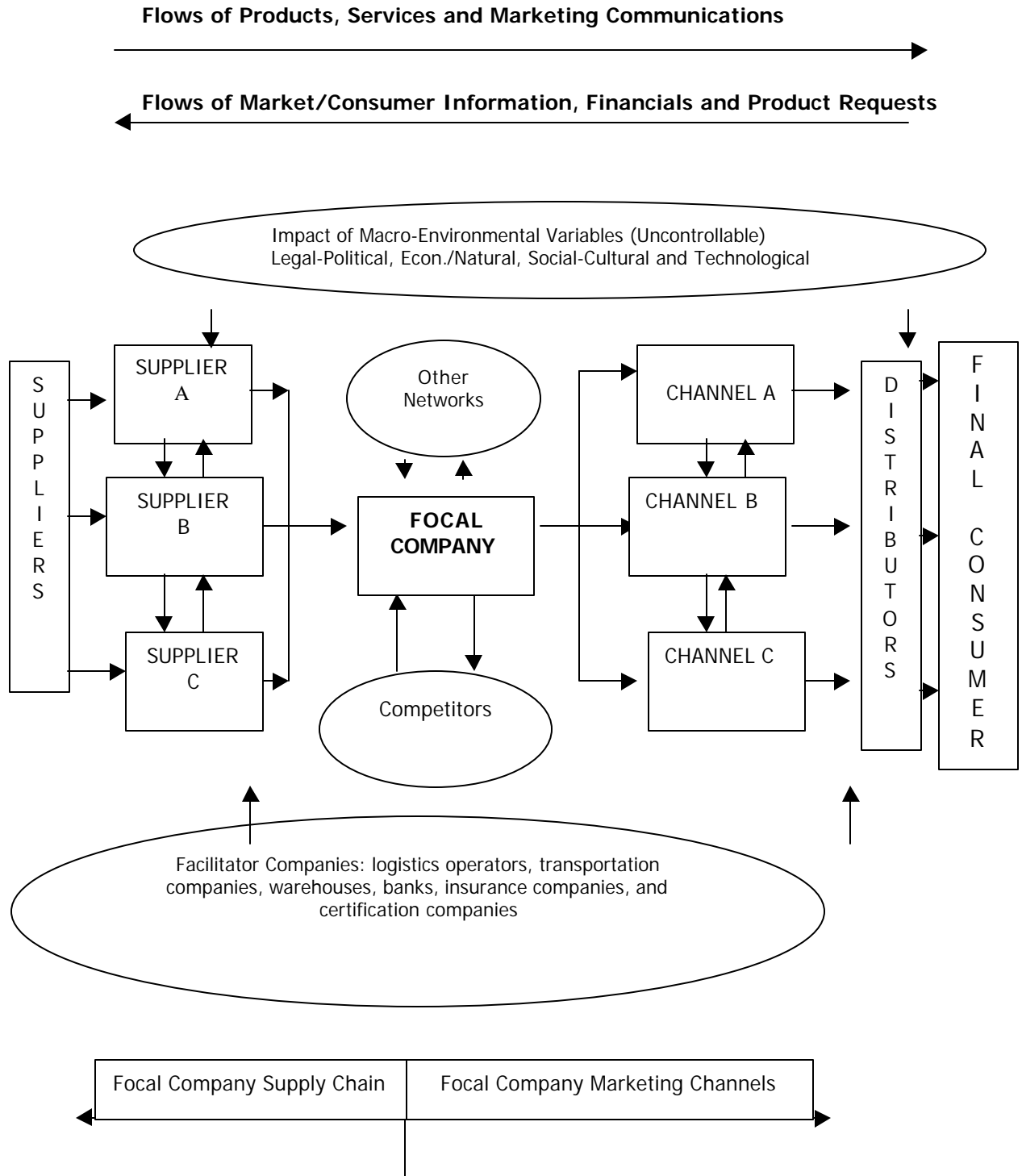
The theoretical model of a *company network* is defined here as the group of supplier companies and distributors used by the company being analyzed (individual case), or the alliance being analyzed (pool of companies that manage the same brand). These companies are responsible for the flow of products, services, communications, information, orders and necessary payments to connect the focal company to raw material suppliers used in production, and to the final consumers of the focal company's products or processed products derived from them (see Figure 1).

The term networks can be used in many ways depending on the analyzed sectors or theories. In neural networks, franchising networks, industrial networks and even in retail chains. In this text, it refers to the approach used by the analyzed company, in other words, the "company network". The analysis of any network should start with a focal company (or cooperative, or other). Lazzarini, Chaddad & Cook (2001) cite Granoveter, among others, when they say "the analysis of networks provides numbered tools to map the structure of inter-organizational relationships and liaisons based on the acknowledgement that the structure in networks limits and at the same time is modeled by the companies' actions".

The company network concept allows us to analyze a company and its pool of suppliers and distributors. The next steps are to analyze the existing relationships among them, the impact of the external environment and the position of competitors. When a company is seen as a complex network, it is possible to do a richer and deeper analysis. This is in essence the *relationships and interaction approach*. This concept has been widely used and spread by Wageningen University in the Netherlands (Omta, Trienekens & Beers, 2001; Neves et al 2001), by the International Marketing and Purchasing (or IMP) Approach (Gemunden et al., 1997; Bridgewater & Egan, 2002; Ford, 1998; Hakansson & Snehota, 1998, Gadde & Hakansson, 2001) and by North American based researchers like Anderson, Heide, John, Jap, Weitz and others. It has also had an important impact on business network management and relationship marketing (Mattson, 1997).

Focusing on the network of the focal company permits the addition of *facilitator* companies (transportation companies, insurance agencies, certification companies, warehouses, logistics operators, Banks, and others) that perform functions to facilitate the flow of the company's products. The presence of the competitors in the company's network also allows to consider collective actions that companies may be taking in terms of marketing (e.g. participation in an association or generating an exporting joint-venture among competitors). It is preferable to consider the *company network management* as the process of management carried out by the focal company (Figure 1) of its entire network. This management has two parts: management of its distribution channels and management of its supply chain.

Figure 1 – The Focal Company Network



With this introduction, next part will give a short overview of three cases where this sequence was used in three years.

5 – Case Studies

Over a period of three years, three firms applied part or all of the sequence proposed. Companies from different origins, markets and strategies were studied. These cases were useful in helping to build the final sequence proposed in the strategic marketing planning process (Section 6).

Table 3 – Companies and main activities in marketing plan

Topic	Company 1	Company 2	Company 3
Product/Market	Low-volume drip irrigation systems for farmers and agro-industries. Durable good (used for at least 10 years)	Paper packages for all types of companies. (Corrugated cardboard box). Non-durable good (just one use)	Genetics (artificial insemination) for farm-use Non-durable good (just one use)
Origin	Multinational	National	Multinational
Turnover in local market	US\$ 50-100 million	US\$ 100 million	US\$ 10-20 million
Market share	40-50%	10-20%	30-40%
Competitors	Direct competition represented by another strong company and by small independent companies and also by importers' agents of international manufacturers.	Market dominated by three main companies that account for more than 60% of market share. Presence of many small regional competitors (that compete strongly on price).	Other multinational companies and competition with natural fecundation process. Only 5% of market uses artificial insemination.
Market research information available	Still very preliminary and reluctant to establish information systems	Market information from the Industry Association. Did an image (product, brand and service) research with clients.	Information comes from software for sales management.
Information systems	None before the plan (only sales per region), now has a Marketing Information System designed but it is not working yet.	Before the plan (only sales per rep and region). Now has a Marketing Information System installed, with permanent: after-sales research non-client research competitors research Research with competitors (network approach).	Before the plan (only sales per rep and region). Now it has a Marketing Information System installed, with permanent: after-sales research non-clients research competitors research.
Objectives	30% growth per year	Obtain the second position in the market, which is to reach at least 20% of market share	At least 20% profit growth per year
Product line	Perceived as the best in the market, with almost no competitors (premium). Trying to introduce different lines for gardening and also water treatment.	One of the competitors has a better positioning in quality x services. Trying to establish differentiation in image through social action (sustainable development).	Perceived as the best in the market, now expanding some product lines due to suggestions of the advisory board created by the plan.
Services	Very important for the sale, since it is a very specific investment that needs irrigation projects, training and constant support for maintenance. The company has problems here, services are considered by clients to be below the positioning of product.	Factor of competitive advantage, mainly the after-sale service is trying customization and cost reduction. They are moving to this segment.	Company does not have problems here, since services are considered to be the same level as product positioning.
Brand	Uses only company brand, but resellers try to add their brand together.	Uses only company brand.	Uses only company brand, race of the animal and name of supplier (father).
Communications	Did not have a plan at all. Most of the budget is used to participate in expositions. Is reluctant in building a plan for communications.	Very few activities are done. The plan started some activities directed at buyers and also suggested more use of the social aspect.	The budget is used for catalogs, sales force promotion and fairs.

Channels	Operates with 90 resellers (stores) Problems with direct sales (key accounts) and lack of support. Resellers were trained in a more collaborative network and a classification of resellers (3 categories) was proposed, with different marketing support from the company.	One level channel, operating with 68 sales reps, and key accounts, linking company to buyers. A deep analysis of the buying decision process of clients was trained, and market segmentation was evaluated through this.	One level channel, operating with 68 sales reps, and key accounts, linking company to buyers. Started an internet selling process and TV selling.
Sales Force	Divided into 5 regions, with regional managers and sales people mostly from the resellers. Starting to give special attention to this reseller's sales force. A manual of operations for the sales force and regional managers was built.	Six sales managers with teams of reps. Since some acquisitions were done, there is overlap regarding geographical areas that the plan addressed and also a strong geographical coverage plan. Tools for better relationships among all managers and reps were implemented.	Divided into 5 regions, with regional managers and sales people. There are some problems regarding geographical coverage. Starting network activities.
Pricing	Price positioning is premium. Price is adjusted according to the client's project. Suggestions to have more control of costs, to nationalize some equipment and to offer financial solutions to clients via buyers of farmers' products (trading financing – network).	Price is about the same as the main competitors'. Price reduction just for new client development (stealing accounts) and price strategies through collective actions.	Price positioning is premium, although margins were down in the last two years due to difficulties in raising prices. Collective actions difficult to coordinate.
Main difficulties	Very centralized, decision making process is not easy and slow.	The company had a new commercial director with old regional managers and some adjustment difficulties. Also there is a strong need to change focus from sales to marketing. Overlap regarding geographical areas. Motivation	Easy to deal with company since positions are clear. President is foreigner but very adapted to local and company's culture. It will have future problems if a new leader comes and does not adapt.
Period	2001 and 2002	2002	2000-2002

Some collective actions were suggested and implemented by these three cases during three years. The actions involved mostly marketing research, price coordination, sales force adjustments and communications. These are all included in the final proposed sequence presented in Section 6.

6 – The Steps for the Strategic Marketing Planning Process Based on a Network Approach

The proposed steps for marketing planning and control based on a network approach are shown in the Table 4. This process should be done for a focal company as illustrated in Figure 2. The main differences in this sequence compared to existing models are in steps 1 and 2 which incorporate a strong network approach, and 6 to 10, which reflect strong collaboration among companies.

Figure 2 – The proposed sequence

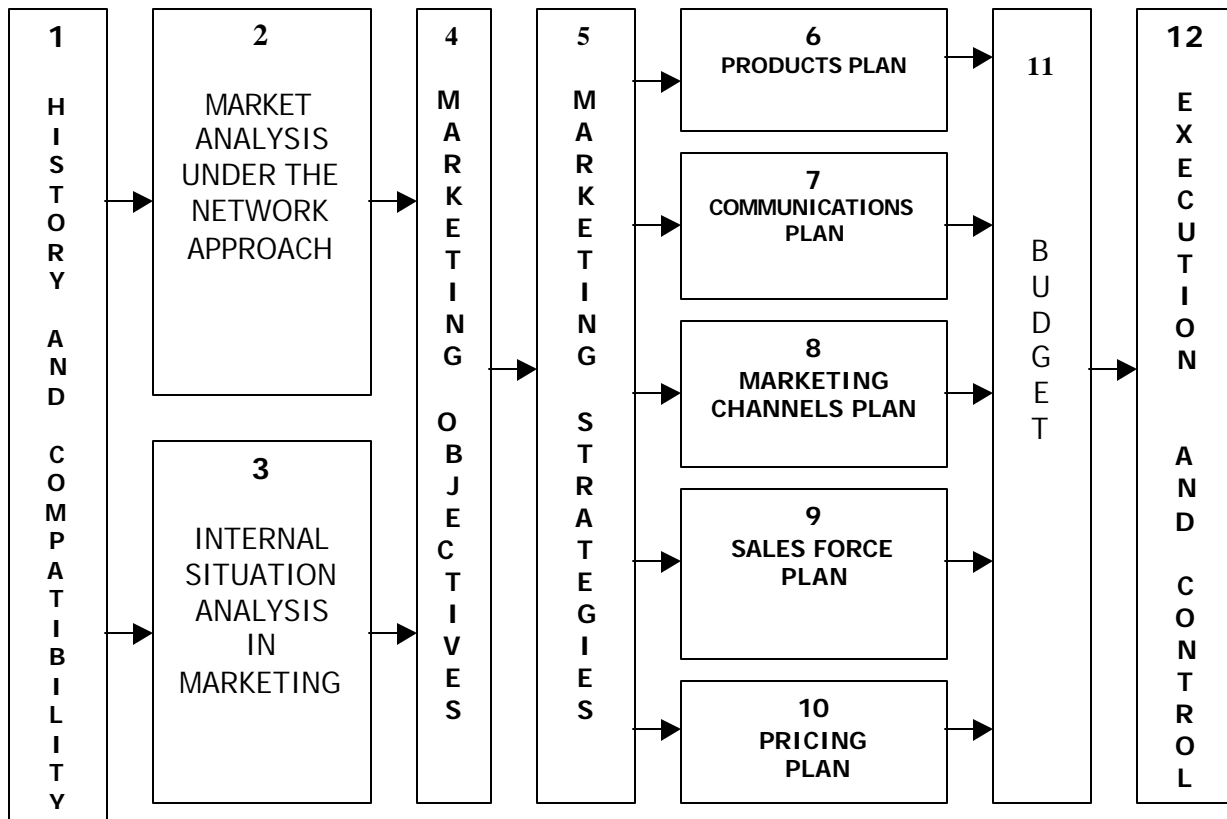


Table 4: Marketing planning under a network approach – Detailed sequence of steps

STEPS	WHAT SHOULD BE DONE
1 – Historical aspects and compatibility	<ul style="list-style-type: none"> • Make a brief history of the company and the alliances it has. • Verify whether the company has other plans already written - mainly a general corporate plan. • Always verify the compatibility of the marketing plan with other areas of the company (finance, operation, human resources, and production, among others).
2 – Market (external) analysis with network concept	<ul style="list-style-type: none"> • Make detailed description of company's network (see Figure 1). • Gather market data and conduct research (external analysis). • Build general market and competitor analysis. • Make a list of opportunities and threats ("step" analysis). • Describe and research consumer behavior (final and also intermediary). • Describe and research consumer (network) decision processes. • Evaluate and make a proposal for better functioning of information systems. • Elaborate a proactive list of collective actions in data generating and marketing/consumer research. • Make a budget for market analysis (budgeting of step 2).
3 – Internal analysis	<ul style="list-style-type: none"> • Compare the strong and weak points of the company with those of competitors. • Conduct benchmarking, based on competitors and from other firms of the network. • List possible collective actions for the reduction of weak points. • Establish benchmarking formal committees in the company.
4 – Objectives	<ul style="list-style-type: none"> • List qualitative and quantitative objectives for the period of the plan (sales, market share, new markets, among others), even network objectives. • Include a high level of detail to allow the evaluation of goals.
5 – Main strategies	<ul style="list-style-type: none"> • Consolidate the main strategies necessary to reach the objectives with a strong network and collective actions approach that includes market segmentation, positioning, differentiation, products and services, communications, distribution and sales and pricing. • This step is a summary of what we expect to see in the next ones (6 to 10).
6 – Product and services	<ul style="list-style-type: none"> • Analyze production facilities analysis. • Develop and improve technology. • Evaluate product line. • Launch new products. • Offer new services. • Make brand decisions. • Make packaging decisions. • Use the concept of networks to verify the opportunities regarding bundling (complement product line with other companies' products). • Budget expenses related to the topics above.
7 – Communications	<ul style="list-style-type: none"> • Determine target-market for communication activities. • Determine objectives to be reached at target-market. • Define communication mix (advertising, sales promotion, publicity and public relations) with a strong network and collective actions approach. • Identify possible partnerships for the proposed communication activities (collective actions). • Define budgeting involving other members of the network. • Describe how evaluation (measuring results) of communications will be done and by whom.
8 – Distribution Channels	<ul style="list-style-type: none"> • Analyze the channels and services provided (distribution flows). • Develop new channels. • Conduct asset specificity analysis and risk analysis. • Conduct channel benchmarking (competitors and other companies). • Conduct power analysis and conflict analysis for governance choices and decisions. • Conduct commercial policies analysis. • Conduct contract analysis (manual of operations for sales people and for distributors). • Initiate new partnerships in new and actual markets (nationally and internationally – see governance forms like franchise, joint-ventures).

	<ul style="list-style-type: none"> • Channel management: define the channel's functions regarding market information, product promotion, incentives for required actions • Prepare channel budgeting. • Verify and describe how distribution activities can be done together by the network's firms.
9 – Sales Force	<ul style="list-style-type: none"> • Determine current numbers and objectives for sales force. • Determine structure and strategy of sales. • Determine size and remuneration (commission policies). • Focus on performance: supervision, motivation and training. • Conduct evaluations. • Also propose activities that can be performed as collective actions, in cooperation with competitors and other companies that act in the same target-markets. • Budget for the sales force.
10 – Pricing	<ul style="list-style-type: none"> • Define objectives related to pricing (maximization of profit, sales...). • Conduct demand analysis. • Determine production costs of company. • Determine production costs of competitors and prices of competitors. • Determine method for pricing (mark-up and others). • Identify price variations. • Define collective price strategies in the network of the company.
11 – Budgeting	<ul style="list-style-type: none"> • Determine costs of steps number 2, 6, 7, 8 and 9.
12 – Plan Controls	<ul style="list-style-type: none"> • Establish strategic marketing business plan controls and management.

Source: Based on personal application of Marketing Plans for 10 companies and suggestions from table 01 and: Achrol & Stern, 1988; Malhotra, 1996; Aaker & Day, 1982; Smit et al., 2001; Biong et al., 1997; Blois, 1997; Anderson et al., 1994; Araújo & Mousas, 1997; Bucklin & Sengupta, 1993; Heydebreck & Maier, 1997; Rubio & Redondo, 2001; Berman, 1996; Stern et al., 1996; Bello & Lohtia, 1995; Williamson, 1985; Rindfleisch & Heide, 1997; Sonnenberg, 1992; Stern et al., 1995; Lafontaine & Masten, 1995; Klein, 1995; Rangan et al., 1992; Dnes, 1996; Anderson, 1985; Kotler, 2000; Weiss & Anderson, 1992; Ingenbleek et al., 2001.

7 – Results of Workshop: Desire to Participate in Common Marketing Activities and Possible Problems

The main results of the workshop are highlighted in this section (the complete table of data is not included here, but can be obtained from the author). Just to remember, the sequence above was submitted to private sector using the questions discussed in session 3. The proposed sequence was accepted by all of the companies, which gives some insight into the applicability of the proposed sequence. Among activities related to **marketing intelligence** (step 2 of the sequence presented in Section 6) all firms conducted competitor analysis, but no other activities were already implemented by all firms. However, the workshop participants noted that this factor is important to them (as demonstrated by their responses to the questionnaire – marketing intelligence received an average score of more than 5). Firms apparently believe they can gain from conducting marketing research and they do have an interest in performing certain activities together, such as research on consumers' needs and decision-making processes. These steps have now been implemented by some of them.

For *advertising* (step 7), the most commonly used media were magazines, catalogues, folders, point-of-sale displays and symbols and logos. The participants recognized that technical video presentations (as well as other technical initiatives) could be made together to instruct the consumer on how and why to use the products. Catalogues were another potential area for joint action. For *sales promotion*, technical field tests, conferences and discounts were the most used tools. The joint actions that participants believed could offer the most gain were conferences, conventions and technical field tests. All of the participants were thus interested in performing these activities together. For *public relations*, sponsorships were the most common activity, but technical trips were considered to be the most important. The participants agreed that such trips could be jointly organized and they all showed an interest in participating.

All of the companies already performed the activities listed for *sales force* (step 9) and were aware of their fundamental importance. However, although this is a crucial area, the participants did not think that sales force activities offered higher potential gain if performed together. The activities related to *products* (step 6) showed practically no agreement among the firms. Even within the distribution step, which they all considered to be very important, only courses and trainings for clients received high scores of potential gain if performed together. Finally, most participating firms were not involved in *exporting*, and moreover, they did not see any potential gain and were not interested in initiating any joint export activities at present.

Although, many actions named in the questionnaire were seen to offer some potential gain if performed together, but only two or three companies were usually interested in participating. This response could turn into collective action among these two or three firms, but not the whole group.

Finally, the participants were asked to discuss the probable or main threats to this potential marketing alliance and how they believed these threats could be reduced. These threats, which were not ranked in importance, are listed in table 5.

Table 5: Threats to potential collective action and ways of overcoming them

What are the threats to joint activities?	How can they be overcome?
Different companies' internal policies	Meet frequently to ensure cohesion of the firms' management team
Conflict of interests and a degree of competition (inclusion of competitive product line) in some product lines	Make clear what the joint activity is (separate product lines, if this is the case)
Need for coordination and measurement of results	Set up external (impartial) coordination committee Include measurements in the plan
Potential conflict between sales representatives that represent a competitors in particular areas	Design regional and punctual actions, putting aside areas where these problems may occur
Different size of the firms (impacting on marketing budget)	Establish a scale in the investment requirements and create different groups for specific actions.
High geographical distance between firms	Make use of electronic mailing and regional offices
Threat of inside information being delivered to outsiders	Create a code of ethics
Need for short term return	Measure results, planning and strategic vision
Different marketing priorities	Segment activities and ensure internal flexibility of the participants.

This workshop demonstrated that the companies were interested in performing several marketing activities together. The final step was then to add joint collaboration steps to the individual marketing plan already presented in Section 6.

8 – Managerial Implications, Limitations and Suggestions for Future Research

Marketing literature shows that the main models of marketing planning and control do not have a strong network approach, but rather, consider each company individually. This article presented a sequence of steps that was used as a marketing planning and control model in three companies over a span of three years. This model is new in that it views the firm as part of a network and makes use of inter-firm relationship tools. Many collective actions can be performed by firms that operate in the same markets as competitors or suppliers of complementary products. The research presented here demonstrated that many firms have a considerable desire to coordinate their marketing actions, and that many have already begun to do so. The main implication of this outcome for managers is that companies can do more with the same or smaller marketing budgets.

Several limitations also appeared in this research. The companies studied do not operate in the same market, and plans were developed in different years by different teams. The ten companies that verified applicability of the sequence are all from the agribusiness sector in Brazil, so it is impossible to say whether the sequence will be applicable to other sectors or countries.

Suggested topics for future research are: application of the plan, improvements in the sequence, deeper analysis of each step, formation and formalization, as well as advantages and difficulties, of collective actions, their stages of evolution and how to manage them in order to be successful. It would be also useful to study the creation of partnerships and their mutual commitment and trust.

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