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Diagnosing and Treating Operational and Implementation Barriers in Synoptic Marketing Planning

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Diagnosing and Treating Operational and Implementation Barriers in Synoptic Marketing Planning

Abstract

Strategic marketing planning is now widely adopted by business-to-business organizations. While marketing planning principles are well established, practitioners attempting to implement the process often find their progress impeded by a variety of barriers. These barriers are explored through a review of published evidence and case study analysis of several organizations. This analysis exposes three levels of barriers to effective business-to-business marketing planning, relating to (i) organizational infrastructure, (ii) the planning process and (iii) implementation. These barriers reflect the synoptic nature of planning in many organizations. The findings lead to the development of a practitioner-oriented diagnostic and treatment tool which guides managers through the marketing planning process. Although this diagnostic deals specifically with issues which are relevant to the marketing planner, its wider implications for strategic planning are also explored.

Key Words

Business-to-business marketing, marketing planning, marketing plan, marketing strategy, synoptic planning, implementation barriers, marketing management.

Diagnosing and Treating Operational and Implementation Barriers in Synoptic Marketing Planning

1. Introduction

Strategic marketing planning is adopted by businesses-to-business organizations from all sectors (McDonald, 2002). Firms use this approach to develop a marketing strategy and a tactical plan which becomes the framework for directing, implementing and controlling marketing activities (Claycomb et al., 2000). With its focus on marketing activities, marketing planning is clearly distinct from strategic business planning, which takes a broader view of corporate goals and the strategic and tactical choices through which these can be achieved (Byars and Neil, 1987).

Marketing planning principles are well established (Gilligan and Wilson, 2004; Greenley, et al 2004) and research shows that marketing planning is adopted by most large businesses and many small and medium sized enterprises (Brooksbank, 1999; Dibb and Simkin, 1997). With evidence that successful marketing strategies and the application of planning approaches are linked (Brooksbank, 1991), the use of marketing plans is now widely endorsed in the literature (Claycomb, et al 2000; Jain, 2002). Confirmation of the specific benefits of formal marketing planning for business-to-business organizations have also been reported (cf: Gross et al., 1993; Ford, 2001).

Despite the reported advantages of marketing planning (Greenley, et al., 2004; Hutt and Speh, 2003), practitioners often find that careful management is needed to achieve the claimed benefits. All too often, firms engaged in marketing planning find that their progress is impeded by a variety of implementation barriers (Simkin, 2002). Business-to-business organizations are no exception. Among the many reasons for these problems the need for a systematic and robust marketing planning process is a recurring theme (Gilligan and Wilson, 2004).

Robust marketing plans can only be developed and implemented if marketing practitioners move quickly to identify and overcome the barriers they encounter (Jain, 2002; Piercy and Morgan, 1994). A practitioner-friendly approach is urgently needed which guides marketing planners through this process. This paper presents such an approach, by clearly framing marketing planning barriers within the context of the stages in the process in which they occur. The key contention is that managing planning impediments should fully reflect the synoptic process of marketing planning adopted by corporations. The term synoptic is used to reflect the sequential nature of the process: recognizing that barriers occur at different levels - some are present at the outset of planning; others affect the planning process itself, while a further set impacts upon the implementation phase.

Three sets of strategic marketing planning barriers faced by business-to-business organizations are presented in this paper. These relate to: (i) the organizational infrastructure, (ii) the marketing planning process, and (iii) the implementation of the resulting plans. These barriers are explored through a review of published evidence and also by case study analysis. The case studies follow the experiences of three organizations as they progress through the marketing planning process. In each instance, the infrastructure, process and implementation barriers are explored. As many of these difficulties can be pre-empted, a managerial tool is then designed which practitioners can use to diagnose and treat the emerging barriers. This checklist-driven device enables managers to systematically work through a series of treatment action points. Although this diagnostic deals specifically with issues which are relevant to the marketing planner, its wider implications for strategic planning are also explored.

2. Marketing Planning Barriers

Business-to-business organization use marketing planning to co-ordinate and control their marketing activities, among other uses (Doyle, 2001; McDonald, 2002). Through this systematic process marketing opportunities are assessed and the organization's marketing strategy is designed and implemented. All aspects of marketing management are involved: driving businesses through a process of marketing analysis, determination of competitive advantage (Varadarajan and Clark, 1994), strategy development, and the implementation of marketing programs (McDonald, 1996). The usual output, a written document known as the marketing plan, captures the analysis and strategic thinking at the heart of the planning process and focuses on the marketing programs and implementation activities which will be rolled-out.

When marketing textbooks describe marketing planning, the focus is on explanations of the process and the rationale for its use (Dibb et al., 2006). The marketing planning benefits which McDonald (2002) presents are typical: greater awareness of marketing trends, more informed decision-making, improved communication and co-ordination within and between functions, more efficient resource allocation, greater responsiveness to change, and a better fit between marketing strategy and tactical programs.

The problems for practitioners attempting to achieve these benefits are the implementation barriers they encounter when applying marketing planning in practice. Some of these difficulties are reported in the academic and practitioner literature by authors who describe a host of organizational, operational, managerial and communications barriers (Doyle, 1998; Greenley, 1982; Simkin, 2000; Verhage and Waarts, 1988). As Table 1 shows, these impediments range from leadership, cultural, and communication issues, to shortages of data, personnel and other resources.

TABLE 1 INSERT HERE

Guidance about managing and implementing marketing planning in the face of these problems is more difficult to find. Much of the available work draws on internal marketing principles (eg: Leeflang and de Mortanges, 1996; McDonald, 2002; Piercy, 2000). For example, in his discussion of internal marketing, Lings (1999) argues for the application of marketing principles within the company, using communication and guidance programs targeted at internal audiences to develop responsiveness and a unified sense of purpose among employees. Day and Montgomery (1999), drawing on the work of Deshpande (1998), agree, arguing that personnel involved in marketing activities (including planning) need to be cross-functional, cross-hierarchical and more cooperative in their practices in order to be effective. They suggest that without addressing who to involve in planning and how to facilitate their cooperation, there is less likelihood of a successful outcome.

A few authors go further, identifying a range of so-called marketing planning ‘pre-requisites’ (eg: McDonald, 1992), which organizations are encouraged to address at the outset of the marketing planning process. Simkin’s (2002) list of these requirements, which includes operational considerations, personnel involvement concerns, level of command issues, resource requirements, internal and external communications, timing concerns and the need to manage participants’ expectations, is typical. Cravens (1998) also emphasizes the role which resources, communication and skills play in the successful facilitation of the plan and its implementation. While such guidance enables businesses to anticipate marketing planning problems and to be more proactive in finding solutions, it is based only on a basic understanding of the problem.

Part of the implementation problem is that best-practice guidance fails to distinguish between barriers impeding the planning *process* and those impacting upon the *actioning* of the planning outcomes. This is an important distinction, given that the marketing literature is supportive of formal and linear planning approaches. For example, Leppard and McDonald’s (1991) case study analysis of a cross-section of UK corporations, identified the characteristics of a complete marketing planning process. This includes an information gathering and analysis stage, determination of marketing objectives and a marketing strategy, the creation of marketing programs, implementation of the plan’s programs and ongoing monitoring of performance (Leppard and McDonald, 1991). A key feature of such "synoptic" methods is that they enable organizations to make structural and operational changes to assist the planning process.

The difficulty with the existing literature on barriers is that it fails to reflect the synoptic nature of planning, and is therefore insufficiently specific in the remedies it offers. Simple lists of marketing planning barriers and pre-requisites are not an adequate solution to this problem. Managers need clear and systematic guidance if they are to effectively implement their marketing plans. They need to know when planning barriers are likely to occur, to understand how they can be diagnosed and what they can do to overcome them. If, as the evidence suggests, managers are adopting synoptic marketing planning approaches, operational and implementation guidance is needed which reflects the character of that process. This involves offering specific direction and remedial actions which are tailored to the sequential nature of the process, explicitly dealing with the different levels at which the barriers occur. These barriers are now explored more fully through case study analysis.

3. Analysis of Case Studies

Studies of marketing planning highlight the complexities of the process and the wide range of personnel who become involved in the process (cf: Dibb and Simkin, 2008; Leeflang and de Mortanges, 1996; McDonald, 1992; Simkin, 2002). A detailed review of these impediments and their causes can only be achieved through ongoing contact with those responsible for conducting and implementing marketing planning programs. A case study approach was deemed appropriate because of the need for an in-depth appreciation of the planning implementation process (Blaxter et al., 1996; Burgelman and Grove, 2001; Yin, 1994). A multiple case design was adopted, with the aim of achieving *theoretical replication* across the organizations studied. The firms were all large global organizations with well-established marketing functions and marketing planning cycles, from the IT services, defense electronics, and construction sectors. Each organization had a particular set of problems which senior management felt might be solved through the planning activity. These issues are explored in more detail in the individual case studies.

There were three underlying reasons for selecting these case organizations. First, each of the firms had a stated commitment to the effective implementation of marketing planning, the process at the heart of the study. On the basis of previous published studies, judgments were made about whether the challenges facing these companies are typical of those encountered by other business-to-business organizations. Second, a deliberate decision was made to study the practices of large corporations with well-established marketing functions, because it was felt that exploring the problems faced by more experienced marketers would provide a rich source of data. These are, therefore, worthy of analysis because they enable the observation of complex phenomena which would normally not be readily accessible. Third, ready access over a prolonged period was available to senior and line managers, policy makers, client-facing personnel and product delivery staff across national borders and business units. Access was also negotiated with other stakeholders, including clients, suppliers, business partners and advisors. The opportunity for prolonged and open access to such large corporations was critical to the success of the research. In particular, it meant that a longitudinal study of the organizations' planning activities could be undertaken. Given the synoptic nature of planning and the implications for implementation problems, a cross-sectional study would not have sufficed. It is not the intention to claim that the findings from these case studies can then be generalized to others. Instead, in line with Yin's (1994) recommendations, the aim is to generalize the results to marketing planning theory. These findings will then provide a theoretical basis against which other cases can be compared in the future.

These were *embedded* cases, with data being collected through frequent meetings with senior marketing, strategy and sales personnel and on-going observation over three or four years. Some of these meetings were regular departmental meetings, while others were set up with individuals or groups of managers specifically to evaluate the planning activity. Using detailed checklists compiled from the literature review, a wide range of issues was monitored. These issues were specifically organized to reflect the point in the planning process at which they occurred, dealing with the characteristics of the process as well as the implementation of its outputs. Information was collected on the:

- functional structure of the business
- marketing planning objectives
- characteristics of the marketing planning program
- marketing analyses and data collection carried out
- personnel involved and the nature of internal marketing processes
- outcomes of the marketing planning process, including implementation barriers and actions taken to overcome them.

As Flint et al. (2002) indicate, the trustworthiness of the research data is an important consideration for researchers. Here, a number of steps were taken to ensure the quality and credibility of the data. Detailed notes were taken to record the required information. Immediately after the meetings these data were recorded in a format reflecting the synoptic character of the marketing planning. The stages of the process therefore formed the framework around which case descriptions were subsequently developed. By teasing out the different levels of implementation barriers, and by developing insights into their causes and effects, a process of explanation building was adopted (Yin, 1994). Follow-up interviews and discussions with relevant personnel played an important role in this iterative process, providing the opportunity for further probing and for the accuracy of the information to be checked. This increased the confidence that the findings credibly represented the collected data.

The material presented in the cases has been organized to reflect the synoptic character of the marketing planning process, to capture the marketing planning objectives and to highlight the different levels of implementation barriers. Each case contains background information, an overview of corporate objectives, and consideration of the planning process. The problems encountered are explored and the adopted solutions examined. In each instance, these barriers are organized into infrastructure, process and implementation impediments. Following the presentation of the three cases, the fundamental issues causing the problems are more fully explored and remedial actions are proposed.

3.1 Case 1: The IT Services Corporation

Background

This global IT services business had integrated a host of national companies and operating brands within a single corporate vision. The organization had a strong ideas-led reputation and a good track record for expertise and responsiveness to clients' needs. However, there was little formalized planning activity, and weaknesses in the company's external brand image combined with problems harnessing internal capabilities had caused profitability problems.

The senior leadership team decided to improve the corporation's fortunes through a marketing planning program to address the operational issues faced by the business. The aim was to harness the positive aspects of the organization's informal decision-making, while instigating rigorous opportunity analysis and resource allocation. This approach was supported by the organization's parent company, which wanted to see a stronger target market strategy and more objective assessment of market opportunities.

There were many problems to overcome. The sales-led culture meant that planning was not deemed a priority: if a customer called, planning meetings were cancelled. Team spirit was adversely affected by the split locations of the business teams. Awareness of the resource and operational requirements for effective planning was low and managers were reluctant to take responsibility for implementing plans. Under this sales-driven approach there was no behavior of seeking repeat business or in developing replicable solutions for different clients. The profit potential of new leads was neither formally assessed nor benchmarked against the corporation's objectives. Instead the emphasis was on the intellectual challenge of developing the next bespoke solution. Communication between business teams and across product groups was poor, even though clients in different sectors shared common IT problems. Interestingly, many clients chose the organization because they expected to benefit from its cross-sector, multi-national expertise.

Agreed Marketing Planning Objectives and the Adopted Process

1. To identify key opportunities, to develop stronger competencies in these areas, and to rebalance the organization's portfolio.
2. To develop customer-derived service and product propositions that reflect market trends while differentiating the organization from is rivals.
3. To establish a clearly defined target market strategy, based around building relationships with a much broader set of client stakeholders than previously, including those directing client organization strategies.
4. To reflect the virtual nature of day-to-day networking and decision-making inside this fragmented and geographically spread organization.

The organization developed a team-based approach to marketing planning, involving senior directors, line personnel, external facilitators and industry sector experts. The initial focus was on each business unit, with separate management teams responsible for their own plans. Planning activities involved assessing client needs, market trends and competitors' plans, in order to develop client-centered business propositions rather than focusing first on the organization's technical solutions.

Profitability gains were quickly achieved and the organization's reputation within its target markets improved, within the first year from the onset of the new approach to marketing planning. From being loss making, within four years the organization became hugely profitable, was an employer of choice in its sector, with an enviable bid-to-win ratio. Feedback from new clients praised the organization's engagement style, focusing on its understanding of customer issues and compelling product and service propositions. However, the company's eighteen-month planning journey was punctuated by a series of problems.

Problems and Solutions

1. Infrastructure Barriers

- Managers were unfamiliar with the skills, information requirements and tools of marketing planning. They needed training and support, as well as guidance in identifying opportunities and target markets.
- Personnel and data shortages were a problem, with shortfalls in relation to the market challenges faced by clients, the consequent impact upon IT needs, and competitive intelligence. The planning process was more systematic and analytical than anything practiced previously. The need for additional information and for personnel who were skilled in data gathering and analysis had to be addressed.
- Time was scarce, yet the analyses and strategic thinking were time-consuming. With pressure for immediate sales wins, some business units were better at balancing day-to-day demands with producing their marketing plans. The most successful units were used to champion the process among managers and to put pressure on other business units. This helped move the business away from its short-termism and sales-led ethos.
- Ineffectual communication across teams and client sectors was a major barrier. A program of activity was designed to address these internal communication challenges and to instill the benefits of sharing ideas and learnings.

2. Process Issues

- Some managers were reluctant participants. Using managers to champion the benefits of planning helped, but marginalizing or removing problem managers from positions of interference was also necessary in some cases.
- There were few existing mechanisms to share the learning and outcomes between business units. A process was established for pooling market insights, and for sharing experiences and strategic thinking.
- Inconsistent approaches in how key opportunities were identified and agreed was a problem. Adopting the same portfolio planning tools ensured that the cross-functional and multi-hierarchy personnel used the same approach for prioritizing opportunities.

3. Implementation Blockers

- Priorities were now being more systematically agreed, yet some managers continued to pursue the old priorities. Line manager reviews and the organization's reward scheme were modified to reflect the new target market strategy.
- The firm's new strategy demanded that client-facing personnel broadened their contact base inside clients to include more senior executives. This was achieved by broadening the client-facing team and by careful management of these complex interactions. Better skilled client-handling staff were recruited to assist.
- As the organization's marketing and business development resources were reallocated, senior managers needed persuading to revise the performance metrics used, to allow a

more systematic assessment of the new marketing strategy. Initially there was resistance, but eventually, the organization's monitoring procedures caught up.

This organization had significant operational challenges to address. New procedures were needed, the organization's skill-base had to be supplemented, and a radical re-think of internal communications was required. External support was sought to facilitate change and to support the analytical aspects of planning. Fresh recruits brought new market insights, different behaviors and extra skills into the company. Having established a new approach to managing the portfolio, client-facing personnel had to be orientated to this new way of behaving and changes were needed in how performance was measured.

An important outcome of the process was a revised business model, with client-led product development, a new target market strategy, a broader set of target stakeholders inside the new clients, and an updated approach to client engagement and relationship management. Underlying these developments was a newfound focus on internal marketing, through which managers were encouraged to engage with the analyses, strategic thinking and implementation activities associated with the planning process. Although the adoption of marketing planning brought significant benefits to the organization, the program was not without difficulties.

3.2 The Construction Industry Supplier

Background

This leading supplier of bitumen and bespoke coatings/emulsions operated in a crowded marketplace with major rivals from the giant multinational petrochemicals businesses, such as BP, Shell and Exxon. By focusing only on the bitumen sector of road and building construction, the organization had established market leadership despite the intimidating competitive set. A shrewd understanding of the marketplace, astute market segmentation, effective managerial processes, a focus on product innovation and logistical flexibility, had enabled this smaller, independent organization to seize leadership and gain an enviable customer reputation. A core challenge was to co-ordinate planning activity across many market segments in twenty countries. In so doing, the business also needed to take time out from day-to-day operations to understand market dynamics and plan accordingly.

The organization traded primarily in northern Europe, the USA and South America. Each of its twenty key territories had its own sales and marketing team handling brand development, target marketing, marketing planning and the execution of sales and marketing programs. One Sales and Marketing vice-president co-ordinated these efforts and ensured a fit with the organization's strategic plan and overall branding. Historically the organization focused on three core product groups: PEN bitumen, polymer modified bitumen, and emulsions of bitumen. However, the organization had increasingly structured around customer applications, such as sidewalk dressings (emulsions), road dressings, road construction, roofing, fine surfaces (eg: grand prix racing circuits and airport aprons), plus a variety of specialist applications for bitumen including drainage sealants, carpet tiles and the waterproofing of dams. Each market had been researched to determine the differing customer needs, core market trends and dominant competitors. The organization was under pressure from shareholders to both grow revenue streams and maintain market leadership in existing operations.

Agreed Marketing Planning Objectives and the Adopted Process

1. To up-date the organization's understanding of the marketplace and emerging challenges.

2. To identify priority target markets based on the analyses undertaken as part of the planning process.
3. To maintain the organization's reputation as fast-moving and innovative by up-dating its brand positioning and customer service proposition.
4. To provide the foundations for designing innovative marketing and sales programs to implement the evolving marketing strategy.

In year one, teams of around twenty managers were assembled in each national market, including sales and marketing executives, senior managers responsible for product development, production, finance and operations, and the CEO. The process began with the group examining: (a) the current market position, (b) customers' buying processes and needs, (c) market trends, (d) competitors' situations and their implications, (e) organizational strengths and weaknesses, opportunities and threats, and (f) deficiencies in the firm's marketing intelligence and information. In some cases, the availability of information was poor and efforts were needed to fill gaps in understanding. The intention, once these difficulties were overcome, was to conduct a series of marketing analyses to redefine the targeting approach, branding, basis for competing and marketing proposition.

Three key difficulties were identified: (i) a lack of competitor intelligence; (ii) the organization's highly subjective, inconsistent approach for determining target market attractiveness; and (iii) even though the emerging market trends had implications for the organization's long-term strategy, senior decision-makers had problems considering strategy beyond a three-year horizon. In an attempt to overcome these difficulties, the twenty managers in each country were 'paired' up to examine key customer markets, networking with external experts and partners to supplement their knowledge. The aim was to amass customer and competitor data before collectively agreeing the relative market attractiveness of different market segments and product opportunities and the organization's ability to profitably pursue these. This systematic process added objectivity to the determination of target market attractiveness and provided a useful portfolio-planning tool to help steer future strategy. There was rapid progress within the first four months in each country. However, despite the strong team spirit and well-motivated participants, a number of problems occurred.

Problems and Solutions

1. *Infrastructure Barriers*

- Competitor intelligence was poor, confined to simplistic overviews of one or two key industry players. Competitor analysis had been neglected in favor of focusing on identifying changing client needs and addressing these ahead of the competition.
- The small number of managers enabled fast-moving sharing of ideas during the analysis stage of the planning, but limited the depth of national market or customer segment knowledge. Networking with external experts and greater participation in industry bodies was used to overcome this problem.
- The company structure inhibited communication and data sharing between countries and key accounts. In year two, the process was changed to include a broader set of managers to share insights and agree strategy. This ensured that economies of scale were harnessed, while allowing national teams to reflect local issues in their plans.

2. *Process Issues*

- Efforts to engage in more countries and market segments were inhibited by the organization's subjective approach to assessing target market attractiveness. The planning process adopted a transparent cross-functional, multi-hierarchical approach to portfolio planning, using the directional policy matrix. This allowed a more objective approach to agreeing priorities and resource allocation.
- The organization's short-term planning horizon resulted in detailed tactical plans for two-year periods, but ignored medium-term issues. Action was taken to modify the process to capture and react to medium-term issues arising from the market analyses.

3. *Implementation Blockers*

- The 'co-operative' style of leadership in many national teams resulted in decision-making by slow-moving, democratic committees. An external consultant persuaded the corporation to adopt leaner and faster decision-making involving fewer leaders.
- With success mainly measured on the basis of profitability, other measures, such as market share gains and increased brand awareness were being neglected. The assessment of new opportunities and the redefinition of target markets were not forward-thinking enough. More balanced performance measures were established.
- The corporation was reorganized to concentrate on pan-global customer groups or market segments. National managerial teams were broken up to concentrate on these new

groupings. Many individuals moved to new roles or geographical territories. The resulting disruptions negatively affected the analyses and production of plans.

Many problems centered on organizational structure, reporting issues and the re-structuring around customer segments instead of national markets. Managers had to hand over their marketing planning responsibilities and simultaneously begin analyzing unfamiliar markets. The scale of this operational change caused delays, as managers struggled to re-orientate themselves. This reorganization required a full year's trading to become established. The ongoing planning activity adapted to reflect these structural changes in subsequent planning cycles, but the process required two cycles (years) before it become established. Through the introduction of portfolio planning and more formally specified performance measures, the organization was able to monitor the outcomes of the new marketing strategy and programs. In the following four years, the organization further cemented its market leadership and gained market share.

3.3. The Defense Systems Manufacturer

Background

This defense corporation manufactured electronics and power modules for missiles and radar systems. Its technology also had applications in non-defense markets, such as oil and gas exploration, medical monitors, security alarm sensors, and the production of niche-capability semiconductors. Yet the corporate mindset was on developing groundbreaking bespoke solutions for military applications by responding to one-off invitations to tender. This reactive planning approach was a poor fit with non-military market opportunities, which tend to involve repeat sales of similar components to different clients. Managers involved in planning for the future, regarded such markets as mundane. As a result, unfamiliar non-defense market sectors were being inadequately resourced.

The sales and marketing personnel in the well-established marketing function were familiar with marketing planning principles. Detailed marketing strategies and tactical plans were already routinely prepared for the organization's defense markets. A decision was now taken to more proactively target non-defense opportunities by engaging in a detailed program of marketing planning. Year one of the new strategy was dogged with problems: there was a dearth of marketing intelligence on the non-defense sectors, and financial constraints meant that no extra personnel were available. However, access was made to external consultants and to market research providers.

Participating personnel knew little of customer needs or expectations in these unfamiliar sectors and were unsure about the relevance of their organization's competencies to these markets, the nature of competition, general market trends or specific product requirements. There was no internally available marketing intelligence or the necessary skills or time to collect it. Although highly motivated, those involved were also committed to working on core defense product teams. However, the 'can do' culture of this fast-growing organization created the necessary momentum for developing the new marketing plans.

<u>Agreed Marketing Planning Objectives and the Adopted Process</u>

1. To identify and explore non-defense marketing opportunities.
2. To develop target market strategies for the identified opportunities. To determine which business customers to pursue, appropriate points of contact, suitable positioning and bases for competing.

3. To create specific marketing programs for the new sectors. New campaigns would be required, supported by sales and client handling personnel with skills not already within the organization.
4. To manage the roll-out and resourcing of the new programs, using a detailed cost-benefit analysis to ensure viability of the proposed target market strategy and marketing programs.

Around forty sales, marketing, technical and R and D personnel participated in the process, making good progress in unearthing pertinent information so that basic marketing plans could be produced in year one. An external consultant guided the process, instigating regular reporting points to ensure progress. Work teams focused on a range of non-defense sectors emerging from a brainstorming exercise. The leadership team was proactively involved in supporting the work teams. The process followed by the team helped to (a) determine which potential markets were worthy of further investigation, (b) specify the core marketing intelligence information gaps to address, (c) specify the required personnel, MIS, financial resources, as well as communication needs, skills and time necessary to produce a full marketing plan in year two.

In the first planning season, targeting strategies were developed for the most viable opportunities and the sales team set about identifying prospects. There were many initial successful engagements, resulting in a large order book and the scale economies required to make this business growth strategy viable. Although this helped motivate the teams, some operational problems and skills shortages also emerged. Within four years, many of these problems had been overcome, with over 50% of revenue coming from non-defense sales, a doubling of the organization's workforce and a trebling of profitability.

<u>Problems and Solutions</u>

1. Infrastructure Barriers

- Data shortages caused major problems. The MIS needed to be developed and wide-ranging market analyses were needed to populate it. A system was set up to enable ready access to information, reducing the duplication of efforts across work teams.
- Personnel lacked the specialist skills to carry out some aspects of the process. External experts were brought in to provide appropriate training and support.
- Time pressures were huge, as managers balanced the non-defense and defense work. Faster moving work teams shared ideas on data collection and overcoming skill gaps, while helping showcase the commercial benefits of the process.
- An internal shortage of resources for required brand building in the non-defense sectors meant that some skills were sourced externally.
- All five SBUs were searching for non-defense customers, placing a strain on resources, co-ordination and communication within the organization. A central marketing function was established to manage these activities. This helped improve internal communications and aided the sharing of market insights.

2. *Process Issues*

- New skills and processes were needed to handle the non-defense marketing campaigns. These processes had to be introduced in a way that did not jeopardize the corporate ethos or detract from the core defense business.
- The organization was used to long-lead times for pursuing one-off defense opportunities. The immediacy of non-defense sales leads required a more nimble approach to resource allocation, production planning and logistics.
- The organization struggled to handle the wide variety of opportunities. Tools were created to assess the relative merits of each emerging opportunity to ensure that only the most worthwhile were pursued.
- Current processes for control and performance monitoring were inadequate for handling such diverse sectors. Senior management instigated review meetings every three months through which the main 'must do actions' were agreed and monitored.

3. *Implementation Blockers*

- The organization's brand was weak outside its core defense market and rapid investment was needed. Additional sales and marketing personnel were needed with skills in the new sectors. The integration of these staff needed careful handling, to avoid alienating existing personnel or damaging the team-based culture.
- There were still shortages in data and client-sector knowledge. More work was needed to improve the functionality of the MIS and additional personnel with relevant client sector knowledge and analytical skills were recruited.
- Some realignment of the existing business units proved necessary. Senior management had to sensitively handle the consequent the period of uncertainty among staff.

In the non-defense sectors, systematic customer, market and competitor analysis helped the corporation to pinpoint the most attractive opportunities and develop appropriate marketing propositions. A new brand identity was also developed. Sales in these markets have taken existing technologies to new customers, filled excess production capacity and made significant contributions to cash flow and profitability. Sales are well ahead of projections and there is a growing awareness of the importance of these non-defense activities to the organization.

Nevertheless, it took the corporation four years longer than expected to fully establish its non-defense operation. With hindsight, senior managers recognized that many of the problems causing this delay were avoidable. Progress came when the organization realized how important it was to provide a suitable infrastructure for the planning and strategizing, and to audit the roll-out of its plans. Through its experiences, the leadership team became more proactive in identifying potential barriers, and in remedying the problems.

4. Discussion

The case studies reveal a range of marketing planning barriers relating to operational and structural issues, resources, data and communication. Although this analysis has featured large international business-to-business organizations, the findings are broadly consistent with studies incorporating smaller business-to-business firms and business-to-consumer markets (Brooksbank, 1999; Greenley, et al., 2004; Siu, (2002).

As Table 2 illustrates, the impediments emerging from the findings can be categorized into three groups, according to the point at which they occur. Thus *infrastructure* issues need to be addressed at the outset of marketing planning, *process* concerns occur during the marketing planning activity, and *implementation* barriers must be overcome if the outcomes of marketing planning are to be put into practice at the end of the planning process.

This classification reflects the synoptic or sequential nature of the marketing planning process, explains the changing character of these impediments as planning progresses, and highlights the need for implementation guidance which distinguishes between these barriers. As Table 2 illustrates, it can also be used as the basis for a management tool which diagnoses and suggests treatments to counter these problems. These issues will be explored further within the managerial implications section.

TABLE 2 TO BE INSERTED HERE

4.1 Infrastructure: Diagnosing the Issues

The smooth launch and progression of marketing planning relies on the amenability of organizational structure and operations. Some of the problems the case organizations faced existed because those charged with providing leadership did little to drive the process forward. The construction supplier had to make tough decisions about how personnel were organized in order to overcome some of its infrastructure problems. Even at planning's inception, leadership is required to allocate aspects of the required analysis, to ease internal communication, and to ensure that bespoke planning resources are identified.

Careful management of basic infrastructure elements is also needed. These relate to the availability of data, financial and personnel resources, as well as to requirements for company operations, structure and communication. The data requirement is linked to whether there is an existing marketing intelligence system (MIS) for storing customer feedback, market trend information and competitor intelligence. In practice, at the outset of marketing planning, such systems are often far from perfect. Information can be incomplete, inconsistent, and erratically up-dated. As the construction industry supplier found, even corporations with reasonable customer information can suffer from shortages in competitor intelligence. In such circumstances, a quick response is needed to correct the deficiencies. The defense corporation benefited from its early decision to invest in a well-specified MIS.

Financial and personnel resourcing needs careful consideration. The IT organization discovered to its cost that a realistic assessment of the likely time required for planning is vital. Marketing planning is a resource-hungry activity which invades the time of sales and marketing personnel and impacts upon their day-to-day activities. Dealing with information gaps is especially time-consuming. This was particularly problematic for the defense corporation, which had almost no customer or competitive information in the non-defense sectors into which it moved. Managers' efforts to fill these information gaps initially deflected from their day-to-day managerial responsibilities. This kind of problem is compounded by the need to involve individuals in the process who will ultimately be responsible for actioning the plan's recommendations (McDonald 2002; Simkin, 2000). A realistic and forward-thinking approach to resource allocation is essential, taking into consideration the suitability and skill set of available personnel. For the IT organization, a shortfall in relevant sector expertise was overcome by employing external experts with relevant experience.

Free-flowing internal communications and sharing of information are imperative. Such communication helps bridge the gap between sales and marketing personnel and between product groups or customer segments. Effective marketing planning relies on good quality analysis, systematic strategy development and the formulation of suitable marketing programs. It is damaging if marketing information emerging from the analyses is poorly shared, so proactive management is essential. The case organizations chose to handle this aspect in different ways. For the construction supplier this involved overcoming problems associated with its organizational structure, while the IT organization devised and implemented a program of information-sharing events.

4.2 Process: Diagnosing the Issues

Clear leadership is needed to guide participants and to ensure the robustness of the process pursued (Christensen, 2003; Greenley, et al., 2004). As the pressures on time and the demands for resources intensify, senior managers must continue to free resources, ensure information is shared, and facilitate communication of the process outcomes. Those leading the IT organization had to work hard to champion the benefits of the planning process. A particular challenge was to reduce interference from managers who were resistant to the planning outcomes. Ensuring open channels of communications within and between functions was an important step. This helped to ensure that the process became ‘self-fuelling’, with the results of the analysis driving the planning forward.

At this point, those leading planning must also be ready to play a new role (Saker and Speed, 1992). Far-reaching marketing analyses will inevitably generate opportunities and target market options which were not previously apparent. Senior management must ensure a good fit between emerging proposals and the organization's strategic plan, and probably a re-alignment of resources. Indeed, the output from the analyses may well lead to changes in the corporate strategic plan. As the defense corporation found, the impact of planning on the organization cannot be underestimated.

The requirement for personnel and financial resources will be strongly felt throughout the process. Once underway, the marketing planning process will require the continual up-dating of marketing analyses, marketing strategy and the formulation of detailed tactical programs. This process can tie up the time of many staff, who need freedom to handle the necessary tasks and to communicate the outcomes. No-where was this felt more strongly than in the defense corporation. Existing personnel were time-poor and deficient in the necessary to skills or experience to carry out the required activities. The support of bought-in specialists provided a partial solution to managing the burden.

Effective marketing planning relies on an appropriately 'stocked' MIS. As organizations move through the process, information shortfalls and deficiencies in the MIS must be quickly rectified. Although the defense corporation made rapid progress in developing and populating its MIS, the unfamiliarity of the markets it was entering meant that data shortages affected the entirety of the planning process. Such time-lags in identifying information discrepancies and populating a fully specified MIS with the required data, are largely inevitable. Ongoing efforts are needed to manage these deficiencies so that their impact upon progress can be minimized (Dibb and Simkin, 2008).

As the construction supplier discovered, shortfalls in suitable competitive information may be particularly marked. For this organization, such data were essential in helping to differentiate its marketing proposition from that of its rivals (Doyle, 1998). It is curious how many organizations are able to do little more than descriptively list their rivals, competing brands and products. The case organizations were typical of many others in this respect, all identifying deficiencies in their understanding of competitors' strategies, competencies and the implications for their own strategies. Although considerable progress was made, a more proactive approach to competitive analysis would have reduced the vulnerability of these organizations.

4.3 Implementation: Diagnosing the Issues

The implementation stage sometimes requires structural changes within the organization to accommodate the marketing strategy and marketing programs arising from the plan. In some instances, a company re-organization may be taking place for other reasons. Clear direction from senior managers is needed to carry these recommendations through, while minimizing the disruption so often associated with such organizational change. For the IT organization, this involved broadening client-facing teams and recruiting additional staff to deal with the new emphasis on client problems. The defense corporation underwent a more radical structural overall, to enable the new non-defense applications to be properly served. Senior managers had to proactively handle the marketing plan implementation needs within the context of that change.

Just as the people, time, communication and budget resources which are initially allocated to marketing planning often prove to be inadequate, rarely are contingencies made for tackling unanticipated events. Yet unexpected barriers often arise during implementation, requiring time, effort and resources to overcome. For example, one of the organizations was affected by the resignation of a key member of the planning team at this critical time. The temporary deployment of a bought-in expert, while costly, enabled the implementation phase to continue.

Although data requirements may seem to ease, there is a continual need to update customer and competitor data. For the defense corporation, ongoing efforts were needed to improve the quality of the new MIS. Meanwhile the construction supplier recognized that establishing a strong culture of data collection could ensure the long-term survival of effective planning. Monitoring performance and benchmarking progress against rivals are some of the areas identified as requiring new data after the development of the marketing plan.

Implementation effectiveness will be partly determined by the ability of managers to communicate the marketing strategy and programs throughout the organization. Such communication helps ensure that the consequences of strategic and tactical recommendations are shared between SBUs or managerial teams. Senior management may wrongly assume that common corporate goals will automatically ensure co-operation across managerial boundaries

(Hickson et al., 1986; Kukalis, 1991). In fact, as the IT organization found, such 'out of the box' behavior is unlikely unless it is carefully orchestrated. Therefore, continuing communication both within and between functions is imperative during this implementation phase.

No implementation program is complete until a suitable set of performance measures is in place to assess the impact of the marketing planning efforts. In practice, none of the case organizations had adequate marketing-oriented performance measures in place. As a consequence, benchmarking progress against rivals or assessing the effectiveness of marketing planning proved difficult. Sales and profitability are widely accepted performance measures in most boardrooms. Market share, marketing shareholder value, brand awareness, customer loyalty and customer satisfaction are less often applied (Piercy, 2000). Yet the creation of a balanced set of performance measures, including long and short-term, financial, operational and customer-focused, ensures a more robust assessment of the implementation and outcomes of marketing planning. It is possible that commitment to the analysis, strategy and marketing programs associated with marketing planning would be more likely if adequate performance measures were in place at the outset.

5. Managerial Implications

The case analysis confirms that the organizations studied encountered many of the marketing planning barriers identified in earlier published studies. These barriers occur before the planning activity starts, during the planning process and into the implementation phase. The categorization of barriers presented in Table 2 is revealing in two important ways. First, it shows that some barriers persist throughout the process, from planning through to implementation. These focus around operations and structure, data shortfall, resource availability, and communication. Second, the categorization reveals that the particular character and relative importance of some of these barriers change as the marketing planning process progresses to implementation. These subtleties are revealed by examining the problems at the infrastructure, process and implementation levels.

The problems identified in the *diagnosis* section of Table 2 are commonplace, yet most can be pre-empted. The checklist in the *treatment* half of the table can be used to good effect if it is addressed before embarking on a marketing planning program. Those running the program should systematically work through each of the *treatment* action points. To assist this process these points are synthesized below into a series of practical treatment points and guidance.

5.1 Infrastructure Treatments

The findings from the case analysis pinpointed a range of infrastructure treatments (see Table 2). The first four priority areas listed below must be addressed by managers *prior* to beginning the planning program. Plans for the induction of participants should also be in place at this stage.

1. Involve and empower a suitable senior champion.
2. Audit available financial and personnel resources and prepare an action plan for overcoming shortages.
3. Identify cross-functional teams of participants, clarifying their involvement with relevant line managers.
4. Review available marketing intelligence against projected needs and prepare a plan for filling any gaps.
5. Induct participants into the planning process: manage their expectations about the process and required commitment, communicate timeframes, and ensure awareness of the process is high.

Creating the appropriate conditions for marketing planning is of paramount importance. These infrastructure issues must be clearly established from the outset if they are not to hinder progress later on. The senior management team should identify a committed and respected senior executive to lead the initiative; it should clarify the reporting structure to be applied during the planning program; and, empower participating managers to drive the process forward. There are also complex resource issues which must be addressed. The process of planning is invasive: busy managers find they have extra work to undertake. This needs carefully managing; so that the required personnel are available and have sufficient time in which to actively participate. Cross-functional teams often work particularly well, providing greater insight than if only marketing managers are involved in the process. The commitment of such teams can be assured by carefully briefing participants at the start of the program.

Information gaps and data shortfalls must be systematically addressed. Once identified, the gaps should be quickly filled, so that appropriate data are available for the analysis phase of planning. A well-specified program of research and the creation of suitable information storage will be needed. Inevitably there will be budget implications associated with these decisions. A detailed schedule including timeframes and deadlines for each phase of activity should be established at the start of the planning program. It is important to ensure that this includes sufficient time for progress meetings, as well as the opportunity for the presentation and sharing of findings.

5.2 Process Treatments

The process phase of planning also has a range of treatments associated with it (see Table 2). Those listed below provide the starting point for managers involved in leading and implementing the planning program. The first four priorities must be addressed before the process phase begins. The final point relates to the dissemination phase, the approach to which should also be agreed in advance.

1. Agree the process and personnel to be involved in the following activities: market analysis, determination of opportunities and capabilities, review of strategic priorities, marketing objectives and marketing programs.
2. Identify skill gaps and training needs, seeking external input as required.
3. Ensure ongoing availability and access to required personnel and financial resources and have an action plan in place for overcoming shortages.
4. Agree priorities for required additional data, then collect data and update the MIS.
5. Communicate analysis and strategic outcomes with internal audiences.

In most organizations, a handful of managers will have some prior knowledge of marketing planning, although not all will share the same view of the process. Others will have no previous relevant experience. Adopting and enforcing a robust process helps to ensure consistency and overcome these discrepancies. This process must include a period of market analysis which is used to identify opportunities and prioritize target markets, prior to the specification and implementation of detailed sales and marketing programs. Members of the team need to understand their personal remit within the overall process and appreciate how their activities will synergize with the eventual plan.

A realistic review of the required resources for this planning phase is essential. Individual participants will need mentoring and their skills developing, notably in undertaking the analyses and deriving workable target market strategies. Managers who initially were involved, may be called upon for other duties or be distracted by their 'day jobs'. Those leading the program must be prepared to take remedial action to counter these problems.

The marketing planning process invariably yields new market data, with personnel more broadly exposed to market information than previously. The right kinds of systems are needed to capture, manage and disseminate such insights, aided by those involved in driving the planning process forward. The communication among relevant audiences of emerging insights, strategic direction and the plan's eventual recommendations must also be organized through the preparation of a schedule of contact. These requirements should be seen from the very start as an essential part of the marketing planning process.

5.3 Implementation Treatments

The analysis of cases highlights a number of implementation treatments (see Table 2). The areas listed below should be regarded as priorities for the implementation phase, and the implications of each must be considered before this part of the process commences:

1. Audit the previous track record for implementing planning outcomes, identifying areas of difficulty, then prepare a detailed specification for rolling-out the marketing plan, including timescales, required resources, reporting procedures, and schedules.
2. Assess the availability of financial and other resources against the requirements, taking action to remedy shortfalls and ensure procedures are in place for routinely updating the MIS as new data become available.
3. Agree performance measures against which progress will be monitored.
4. Conduct orientation sessions for participants and other organizational stakeholders to communicate widely the outcomes of the planning process.
5. Establish inter-functional review meetings to monitor progress, maintain momentum and to enable remedial action to handle emerging problems.

One of most important learning points from the case study analyses is the need to review an organization's previous track record for operationalising plans, strategies or new initiatives.

Considerable insights can be gained by exploring what worked previously, and what did not. It is worth questioning whether managers were empowered to work effectively, whether they were willing to become involved and if they freely shared ideas. Other considerations include whether internal communications were adequate and if IT systems coped with data input needs and dissemination requirements. The level of support provided by senior executives should also be considered, as should any timing or other resource difficulties.

A retrospective audit of these problem areas invariably eases the planning process and ensures that previous mistakes can be avoided. The implementation structure for the marketing plan should be addressed in advance: the expected audiences, forums for sharing its outputs, announcement dates and reporting channels. Anyone directly affected by the resulting plan's recommendations should receive an appropriate orientation, so that its consequences are fully understood. Monitoring those involved, to guarantee their ongoing commitment to the plan is also sensible. The corporation's leadership team must establish performance measures to judge the plan and its outcomes. Review meetings will be needed to continue to identify impediments to the roll-out of the plan and to agree suitable remedies. The cost of ignoring these issues can be high, seriously hindering even the strongest of marketing plans.

6. Further Research

This paper combines insights from the literature and case study analyses to explore barriers to marketing planning. The firms studied were large global organizations from the IT services, defense electronics and construction sectors. All were already involved in marketing planning and had well-developed marketing functions, yet they still encountered problems in undertaking marketing planning and implementing the resulting plans. The findings suggest there is value in adopting a more structured approach to dealing with these planning impediments. Three levels of barriers have been presented, reflecting the sequential, synoptic nature of planning in many organizations. These relate to organizational infrastructure, the planning process and implementation roll-out. Diagnosing these barriers highlights a number of effectiveness issues for which a series of treatments have been indicated. In particular, it is suggested that marketing planning in practice can be eased by creating an appropriate infrastructure for planning initiatives; adopting robust processes; and, planning for the implementation and roll-out of the plan's recommendations. The synoptic planning diagnosis and treatment tool captures the managerial implications of the findings in a usable format for those attempting to put marketing planning into practice.

While there are problems in generalizing the findings of individual case studies to organizations in different sectors or situations, the theoretical framework which underpins the analysis can be used as a basis against which new cases can be analyzed. Through this route, the research can be extended to include firms operating in other contexts. Further research could usefully extend these longitudinal studies over a longer timer period. This would enable a longer-term examination of implementation barrier effects and the remedial action taken to correct them. It would thus be possible to explore the extent to which certain implementation barriers can be readily managed or whether particular problems prove to be more persistent. This would provide insights into the scale and scope of different barriers, allowing more informed choices about priorities in managing them. For example, assuming an availability of financial resources, shortfalls in certain areas – such as data availability –

can be relatively readily handled. Problems caused by inflexible or unreceptive corporate culture, are altogether more difficult to solve.

Although this paper has examined implementation within the context of *marketing* planning, the findings have parallels with studies elsewhere in the marketing and strategic management literatures. Market segmentation studies have highlighted implementation barriers (Abratt, 1993; Dibb and Simkin, 2001 and 2008; Palmer and Millier, 2003), some of which are specific to particular stages in the process. In terms of content, the identified planning barriers also fit closely with recent research in strategy implementation. For example, the clear lack of even basic operations and procedures in the three case examples reinforces the importance that Dean and Sharfman (1996) attributed to the procedural rationality in strategic decision-making. The findings are also consistent with those who have argued the case theoretically and empirically for viewing strategic decisions as phased over time, moving from planning to implementation (Mintzberg et al., 1976; Quinn, 1980). A more detailed examination of the wider implications for strategic planning is provided in Appendix 1.

These parallels between the marketing planning and the strategic management literature are not particularly surprising. The implementation issue, with all of its inherent complexity, is one which transcends many areas of social science (Lorange, 1998; Pressman and Wildavsky, 1973). The multi-layered nature of the problem has rendered it difficult for researchers to study. Using case study analysis is one way in which the intricacies of this puzzle can begin to be unraveled. The marketing planning case studies presented here and the resulting diagnostic tool, are just small steps in the journey. However, practitioners will undoubtedly benefit from the guidance offered in this paper to prescribing treatments to marketing planning barriers.

APPENDIX 1: IMPLICATIONS FOR STRATEGIC PLANNING

Planning Barriers

In terms of content, the degree of overlap and comparability for the marketing planning barriers and those in the general strategy literature are highly congruent.

- The dearth of basic operations and procedures in the three cases reinforces the importance that Dean and Sharfman (1996) attribute to procedural rationality in strategic decision-making.
- Strong leadership, both in terms of whether and in what ways senior managers are involved, is shown as essential to successful marketing planning. These findings were factors in Miller et al.'s (2004) study of strategic decision implementation, where both the decision and the organization were shown to suffer if senior managers fail to offer support or engage ineffectively with the decision process.
- The need for resources to support all aspects of marketing planning was clear. This is consistent with the strategy implementation area, where it is shown that if resources do not support the strategic planning process, then barriers are greater (Miller, et al., 2004). These include financial resources (where financial resources are needed to support the process) and human resources (where skills and knowledge are required to underpin the process).
- The importance of effective communication with internal/external stakeholders mirrors the work of Hickson et al., (2003) who found that gaining high levels of acceptability for the process amongst stakeholders was critical in determining positive implementation performance.
- The importance of effective and useful performance metrics is a key concern in the implementation of other strategic decisions, just as it is in marketing planning. McGee et al. (2005) indicate that performance metrics are positively linked to effective strategy implementation. These include financial and operational measures, as well as clear measures of organizational effectiveness. In all three cases presented in this paper, such metrics were either non-existent, or were poorly utilized initially in the process.
- The case studies reveal problems caused by partial knowledge transfer in marketing planning. Firms' knowledge base is seen as a key factor in effective strategic planning and implementation (Spender, 1996), in particular the extent to which the knowledge individuals possess (often tacit) can be transformed into collective, owned and objectifiable knowledge (extant) in the organization.

Planning as a Synoptic Process

At least half of strategic decisions fail at the implementation stage (Nutt, 1999). Such failures tend to be in areas under management control, rather than those which are external, such as government regulations or unpredictable events. In marketing planning studies, organizational structure, personnel and operational practices are identified as potential causes of implementation difficulty (Cravens, 1998; Gratton, 1996). Similar issues are linked to success in strategy implementation. Dean and Sharfman (1996) suggest that lack of procedural rationality (effective operational practices) is a significant implementation barrier, whilst Miller et al. (2004) identified organizational conditions and managerial activities as key impediments.

In strategic management, despite lengthy discussions over whether or not strategies are planned or emerge (Mintzberg and Waters, 1985), the distinctions between planning and implementing have been highlighted both theoretically and empirically (Hickson, et al., 2003; Miller, et al., 2004).

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TABLE 1: Barriers to Marketing Planning Implementation

SOURCES	MARKETING PLANNING BARRIERS
McDonald, 1992; Giles, 1991; Jain, 2002; Pearson and Proctor, 1994; Simkin, 2002	Strategy determined in isolation of analyses or formulations of tactical programs
Dibb, 1997; Greenley, 1982; Jain, 2002; Simkin 2002	Blinkered understanding of the external macro-marketing environment forces
Greenley, 1982; Simkin, 2002	Inadequate marketing intelligence available within the organization
Dibb, 1997; Pearson and Proctor, 1994; Simkin, 1996	Little sharing of marketing intelligence between functions and tiers of management
McDonald, 1992; Piercy and Morgan, 1994; Simkin, 1996	Inadequate senior management support for marketing planning activity
Dibb, 1997; McDonald, 1992; Giles, 1991; Greenley, 1982; Pearson and Proctor, 1994; Piercy and Morgan, 1994; Simkin, 2002.	Poor internal communication within marketing, between functions, business units and management tiers
McDonald, 1992; Piercy and Morgan, 1994; Simkin, 2002	Planning personnel losing impetus and motivation, owing to resource pressures
Dibb, 1997; Greenley, 1982; Jain, 2002; Piercy and Morgan, 1994; Simkin 2002	Insufficient detail in marketing programs or the implementation plan
McDonald, 1992; Simkin, 2002	Inability to break away from existing ways of operating
McDonald, 1992; Piercy and Morgan, 1994; Simkin, 1996	Lack of confidence/conviction amongst those responsible for marketing planning
Pearson and Proctor, 1994; Simkin, 2002	Insufficient vision or the ability to think laterally

TABLE 2: Diagnosing and Treating Infrastructure, Process and Implementation Barriers

Diagnosis Proposals			
	INFRASTRUCTURE	**PROCESS**	**IMPLEMENTATION**
Operations and Structure	Poor senior management involvement and/or lack of leadership: insufficient support for planning and freeing resources; little long-term view of planning's role and the resulting need to modify strategy.	Ineffective senior management involvement slows process and fails to free up people or information; no routine integration of marketing analyses with strategic decisions or marketing programs; poor appreciation of the fit between marketing planning and corporate strategic planning; repeated company re-organization threatens the stability of the process.	Poor senior management involvement, preventing proper implementation of planning outcomes; patchy use of reviews/progress audits: little remedial action; lack of performance measures or the recognition that new metrics must be created; difficulties adjusting to structural changes resulting from the process; repeated company re-organization, making implementation difficult to achieve.
Resources	Little training/orientation for key planning skills (notably the analyses); inadequate bespoke financial resources; insufficient time to plan/conduct the process; lack of expertise and suitable personnel for analyses and strategic decisions.	Insufficient financial resources for the process; time taken impinges on day-to-day tasks; poor knowledge of planning process and tools; personnel have inadequate expertise to translate analysis into meaningful marketing strategy and tactics.	Insufficient bespoke financial resources needed to implement the resulting program; time taken to implement the process continues to impinge upon day-to-day tasks; no recognition that roll-out requires people and time, plus new performance metrics.
Data	No MIS in place; lack of competitor intelligence; weak culture of data collection; ill-informed managers.	Inadequate efforts to update the MIS and to check quality of information; weak culture of data collection and sharing, making it difficult to fill data gaps.	The need to continually update the MIS is not acted upon; no ethos created for routinely using/adding to the information in the MIS.
Communication and Co-ordination	Weak communication within/between functions, causing problems instigating and deploying marketing planning; poor identification and awareness of key stakeholder groups.	Weak communication within/between functions impedes efficiency of the process; information often perceived to provide individuals with power at the expense of others.	Weak communication within and between functions, causing slow, inefficient implementation; poor internal targeting and internal marketing of planning outcomes/decisions.

Treatment Proposals			
	INFRASTRUCTURE	**PROCESS**	**IMPLEMENTATION**
Operations and Structure	• Identify and involve a senior champion. • Clarify the level of command, empowering those responsible with driving the process forward.	• Specify the process and personnel for analyzing the market situation, opportunities and capabilities. • Agree process and personnel for determining strategic priorities, marketing objectives and marketing programs.	• Conduct audit of business's track record for implementing planning outcomes, identifying areas of previous difficulty. • Develop specification for implementation of marketing plan, including: timescales; required personnel, financial and other resources; reporting procedures; and leadership schedules. Be aware of previous problem areas. • Agree performance measures against which progress will be monitored.
Resources	• Audit required financial & personnel resources and compare with those available. Identify shortfalls & develop action plan to overcome. • Identify teams of participants, ensuring cross-functional involvement as needed. • Ensure necessary participant availability by liaising with relevant line managers.	• Identify skill gaps and training needs. Seek external input if necessary. • Check ongoing availability of personnel, time, financial and other resources.	• Assess the availability of resources for the implementation activities included in the detailed specification. Take action to deal with any shortfalls. • Ensure the necessary authorizations are in place to sign-off required personnel, time, financial and other resources.
Data	• Review available marketing intelligence against project needs. Develop a checklist of required data and options for filling these gaps.	• Agree priorities for required additional data. Collect data. • Create/update MIS as data available.	• Ensure procedures are in place to routinely update MIS as new data become available.
Communication and Co-ordination	• Induct participants into the process. Manage expectations about what will be involved and explain participants' roles within the process. • Develop and communicate the timeframes and format for the planning process, so that participants can allocate the required time. • Enable required communications between participants and those with whom they must liaise, so that easy access to information and personnel is assured.	• Communicate with internal audiences as the analyses and strategic thinking progress. • Ensure appropriate access to data and key personnel throughout the process.	• Set-up orientation sessions for participating managers and other organizational members to widely communicate the outcomes and implementation needs of the planning process. • Develop schedule of interfunctional & cross-hierarchy review meetings to monitor progress, maintain momentum and provide support to overcome operational problems. • Establish procedures for remedial actions to handle emerging implementation problems.