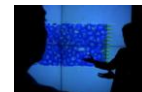


## Prospective Marketing Planning



Jean-François DAVID 2013



Jean-François DAVID  
**Strategist**  
<http://www.davidjf.com>

-30 years within IBM France (**Oil/Chemical/Pharma Marketing Operations Manager, CPG Industry Strategy and Marketing Director, Co-Founder of IBM France Consulting Group**), author of many contributions on various IT and Organizational topics: Intelligent agents, IT perspectives, Strategic Alignment, Processes and IT, ...

Since 95:

- Education (HEC MBA, ESCP, Dauphine, HEC Management, Collège de l'X, ENST, University of Nantes, WUTBS, ...)
- Independent consultant, active member of many networks (EFQM, IQM, AFNET, APM, CJD, ...)

### Research themes:

Governance and IT Governance. **Strategic alignment. IT/Organization/Culture interference.** Time-Based Strategies. KM and cognitive aspects. Man/machine interfaces. **Marketing planning. Large Account planning.**



## JF David module

" Customers and Markets "  
theoretical field: " **competitive analysis and market analysis** "

JF David **practical and pragmatic** module:  
**all the aspects of marketing research, marketing plan...**

JF David "point of view":  
**executive decision making**

The main objective is to learn how to realize a **market research**,  
and how to **prototype an innovative marketing plan**



## Teaching Method & Evaluations...

**"What I hear, I forget.  
What I see, I remember.  
And what I do, I understand."  
Chinese Proverb**

### Evaluation

- personal contributions during the course.
- **Group's "in competition" results for assignment**

















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## some preliminary remarks...

Marketing, a nice word...

Marketing is cross disciplinary, by nature...

Student's marketing knowledge is heterogeneous,...



## Marketing plan applied to a concrete case...

Your mission



Rome Tourism office innovates and, in cooperation with a technology company, invents a new way, a new device, to enrich visiting and learning experience of tourists in museums, monuments, things to see, ....

Your teams have to deliver a marketing plan for this new opportunity.



## Applied to a concrete case: New device for tourists

### The Project:

- definition of the offer, **innovative** idea
- benchmark,
- value chain (market study, positioning strategy, marketing, marketing channels, production, post-sales, ...)
- market research
- Elements for a Business plan
- Marketing plan

### Open subjects inside marketing plan:

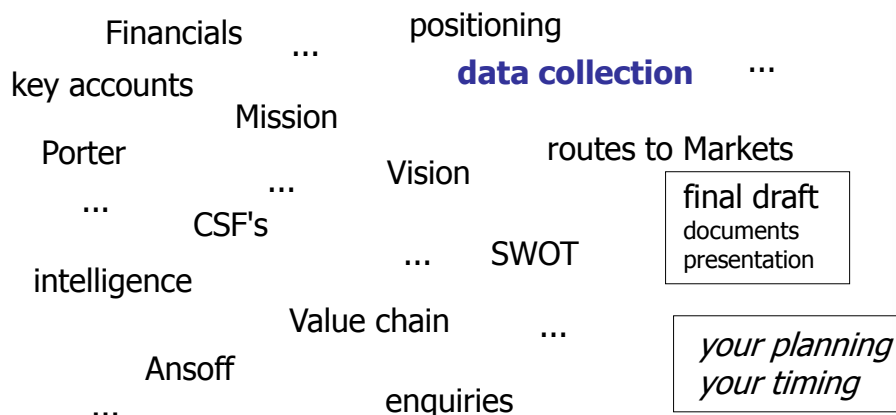
- Precise definition of the project, with team key innovative ideas - -
- Open market, realistic market
- Network of competencies
- Kind of center to be implemented in Europe and/or France
- Alliances and partnerships, potential investments in current centers

### One will judge groups on

- the value/content of market analysis,
- the relevance of their arguments
- their capacity to mobilize all necessary frameworks.



## Define your team methodology...





## Marketing planning course: detailed tentative agenda

- |                         |  |
|-------------------------|--|
| 1) Nov, 12th            | J.-F.David introductory lecture on Prospective Marketing,<br>Teams building, planning  |
| 2) Nov 13 -> Nov 19th   | Data collection, Mission, market, overview, open market,<br>definition of solution, data collection (reports, web, interviews),<br>Segmentation, portfolio, SWOT, frameworks (5 forces, ...), ...<br>Final idea, integration of data collected, finalization of<br>frameworks, |
| 3) Nov 19th             | Vision, Marketing objectives, operational marketing<br>aspects, economics, ...   |
| 4) Nov 19th -> Nov 27th | Additional researches, interviews, data collection   |
| 5) Nov 27th             | Integration of documents, final version of marketing plan,<br>prototype and presentation charts<br>Preparation of formal presentation  |
| 6) Dec 9th              | Exam, Formal presentation of results, rating, discussions  |



## Teams...

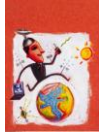
T team		U team		X team	
DUGAN	ANDRADA	BAUDIN	LEA	BACHA	IMANE
DUPONT	EMILIE	EL BAKORI	HANANE	BATAILLE	GILIA
HARBHAJAN	SUNA	FAYARD	VINCENT	DE LAVALETTE	CHARLES
HORREARD	CHRISTOPHE	HADJI	MOINA-AMINA	DEDE	AURELIE
MARTIROSIAN	ALINA	SOMMERAUER	KEVIN	NAUMOVA	SOFYA
SAFSAF	LYDIA			RONGIERAS D'USSEAU	VICTOR

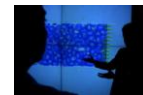
Y team		Z team	
OVANON	CAMILLE	AUERBACH RODRIGUEZ	KIMBERLEY
BURLAUD	MAGALI	FIGUEIREDO	DEBORAH
CZORNYJ	ELISA	JORAND	DELPHINE
EL HACHEM	MARIE-REBECCA	MENUT	KELLY
GRASSET	AUORE	SCHAEFER	ANNE-CHARLOTTE
JAONARY	PRISCA	TEA	JEREMIE



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## Introduction

### ■ MARKETING BASICS



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## Marketing context

- Faster world
- More competitive world
- More uncertain world
- Globalized world



**TODAY SURVIVAL  
IS HARDER & HARDER !**



## Explosion of exchanges:

- Products, services, ideas, ...  
between:
- people and organizations
- people and people
- organizations and organizations

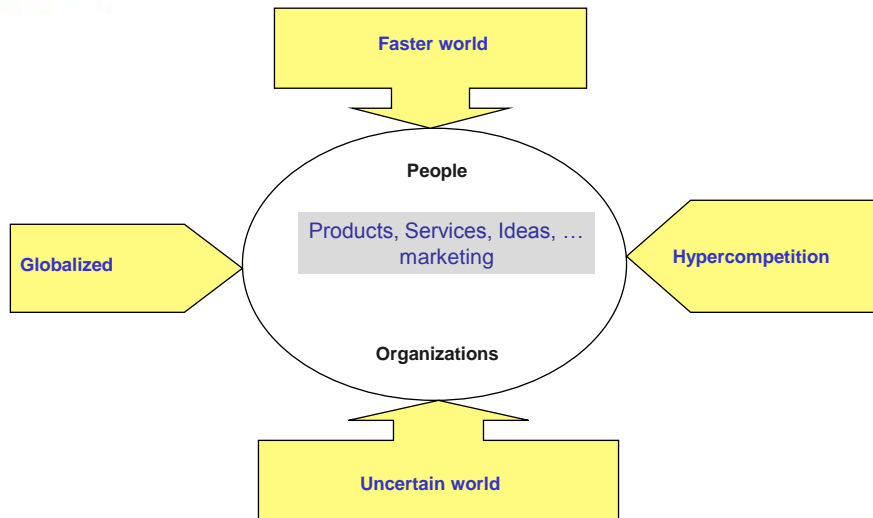


**COMPLEXITY**





## Marketing context



Ad LIBITUM Conseil

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D'après Jean-Pierre BAEYENS

### MAIN CHALLENGES FOR THE NEXT FIVE YEARS...

1. Develop the organizational capabilities of the company (response time and flexibility, total quality, innovation) (92%) 
2. Increase market share in the core business towards leadership (90%) 
3. Develop a full understanding of the client's needs and desires (87%) 
4. Increase the international development (85%) 
5. Launch productivity and cost decrease programs (83%) 
6. Increase the competency level inside some critical structures (technologies / factories/ marketing) and allows sharing of these by profit centers (81%) 
7. Redesign the main processes (reengineering) and in-depth transform the organization and the way the company acts (72%) 

### WHICH LEVERAGE FOR GROWTH?

1. New ideas though client non-satisfaction topics analysis (83%) 
2. Geographical expansion (76%) 
3. Redesign of the main company processes to increase reactivity (74%) 
4. Research of new ideas by combination of apparently incompatible attributes (price / quality / speed / added value / personalization...) (68%) 
5. External growth (61%) 

### THE US CEOs LOOK TO THE FUTURE Foundation for the Malcolm Baldrige National Quality Award 1998

Six trends affecting major U.S. companies are judged to be "major" by more than 70% of the CEOs surveyed:

- globalization (94%)
- improving knowledge management (88%)
- cost and cycle time reduction (79%)
- improving supply chains globally (78%)
- manufacturing at multiple locations in many countries (76%)
- managing the use of more part-time, temporary and contract workers (71%)

Eight other trends were judged to be major by between 50% and 70% of the CEOs:

- developing new employee relationships based on performance (69%)
- improving human resources management (68%)
- improving the execution of strategic plans (68%)
- developing more appropriate strategic plans (64%)
- ongoing measurement and analysis of organizational processes (60%)
- developing a consistent global corporate culture (56%)
- outsourcing of manufacturing (55%)
- creating a learning organization (52%)



and now.....

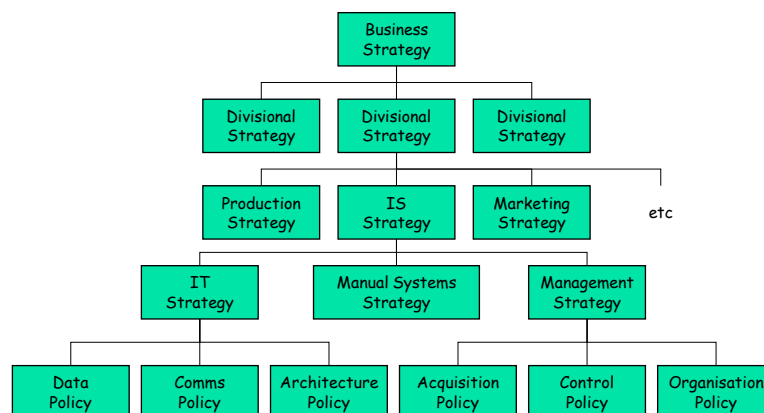
The top three challenges?

Not surprisingly, they are all related to competitiveness as measured by revenue growth. The Conference Board's annual survey for 2004 listed the top three challenges identified by CEOs worldwide as:

1. Sustained and steady top-line growth
2. Speed, flexibility, adaptability to change
3. Customer loyalty, retention



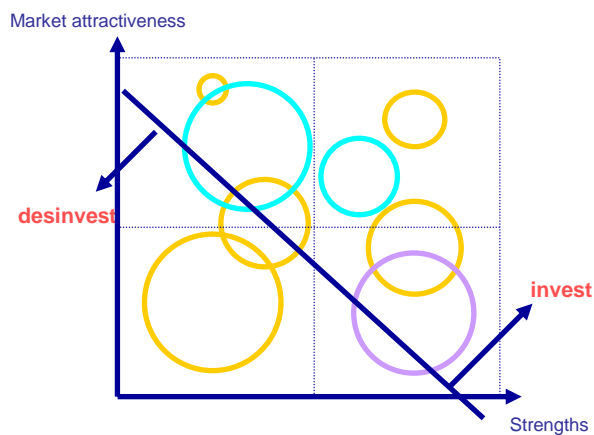
Strategies...?



## Strategies

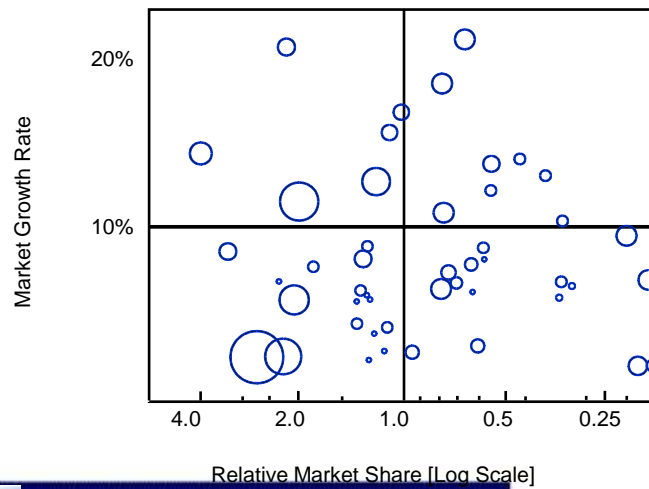


## Basic thinking...

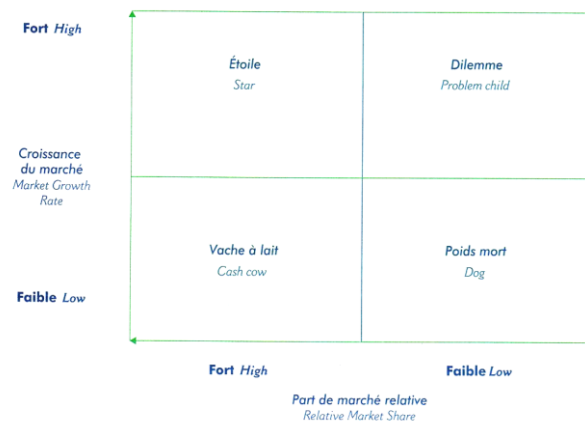




A product portfolio chart [**growth-share matrix**] of a comparatively strong and diversified company



BCG...



D'après le Boston Consulting Group.

## Market / segment selection criteria

Market / segment attractiveness

- Size
- Growth
- Profitability
- Competitive intensity

	High	Low
High	Invest / Grow	Selectively Invest
Low	Maintain/ manage for sustained earnings	Manage for Cash / Withdraw

Business Strengths

- Product Range
- Product Efficacy
- Service Quality (Including distribution)
- Price
- Associated Services (e.g. Technical advice)
- Reputation / Image

Adapted from Professor Malcolm McDonald

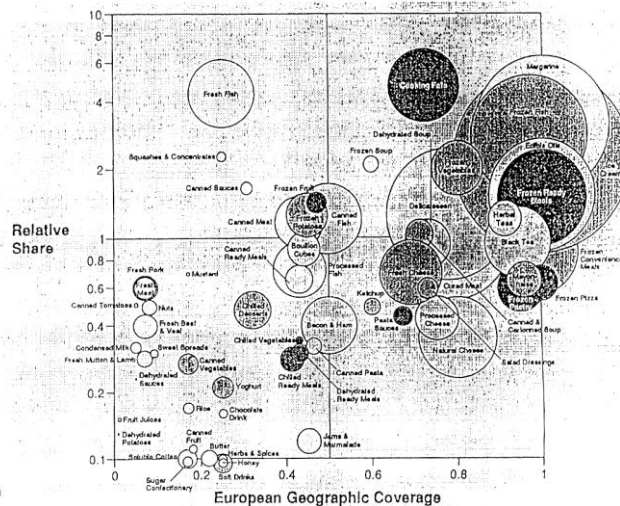


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## UNILEVER'S EUROPEAN FOOD PORTFOLIO



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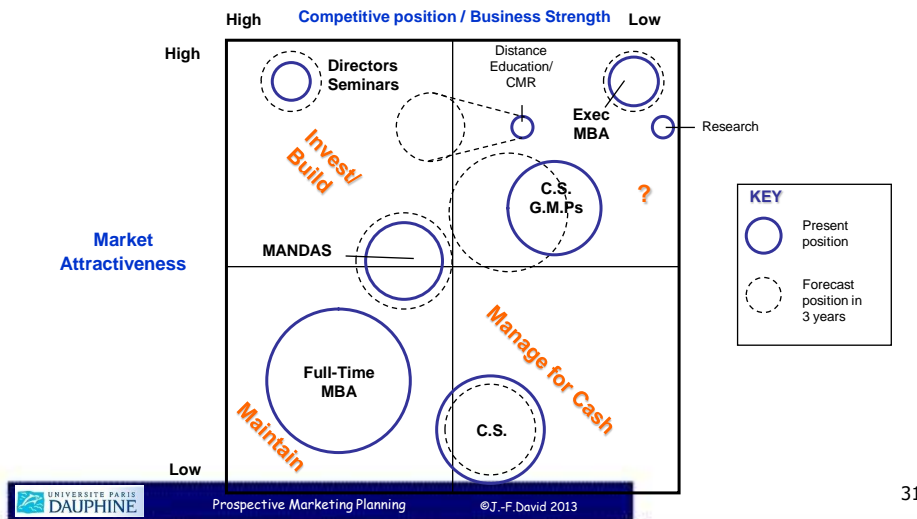
28



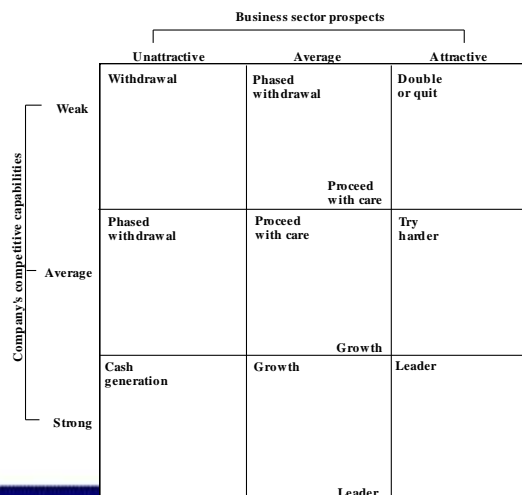




## Sample competitive position / business strength for an higher education institution



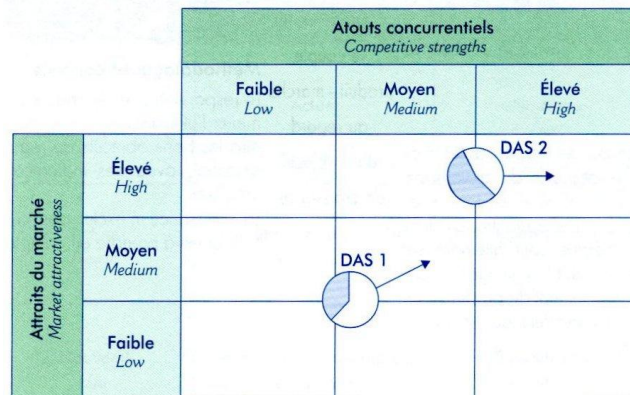
Because BCG type models have limitations, new measures of company strengths and market opportunity have been developed:  
The Directional Policy Matrix (or the GE-McKinsey Matrix)







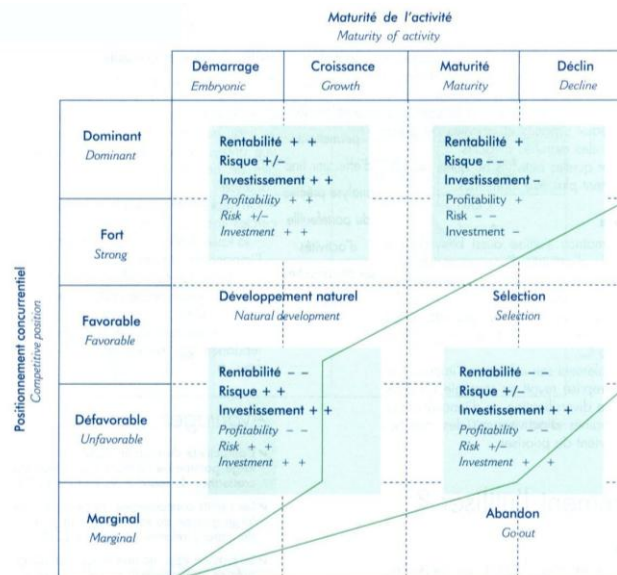
## GE-McKinsey matrix...

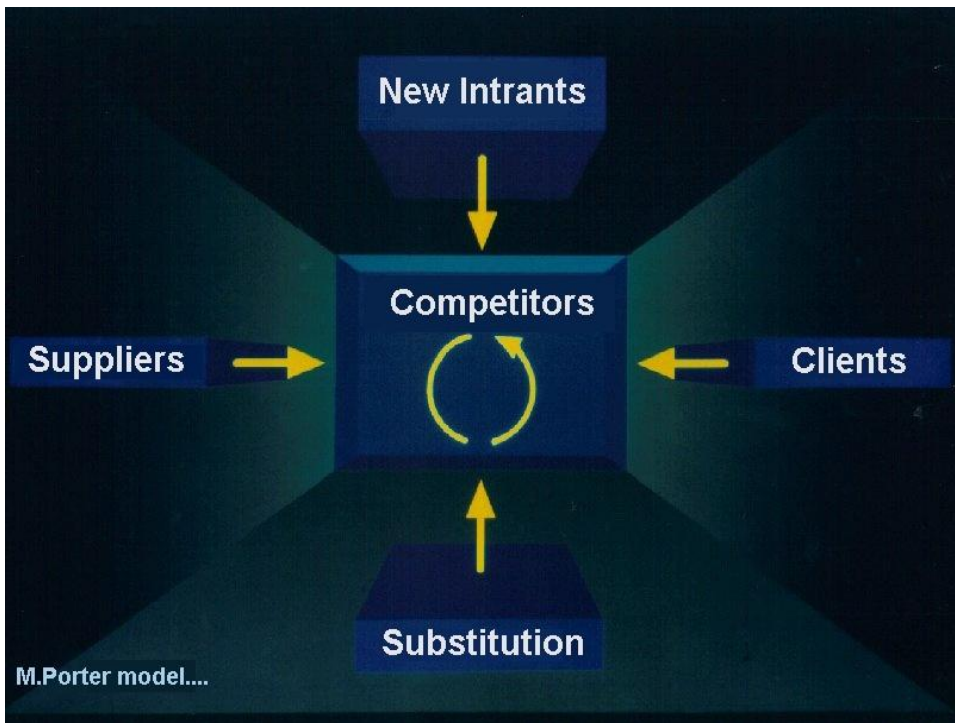


D'après Mc Kinsey.



## La matrice ADL





## Downes and Mui's New Forces Model



+...hypercompetition



## WEB 2, ...

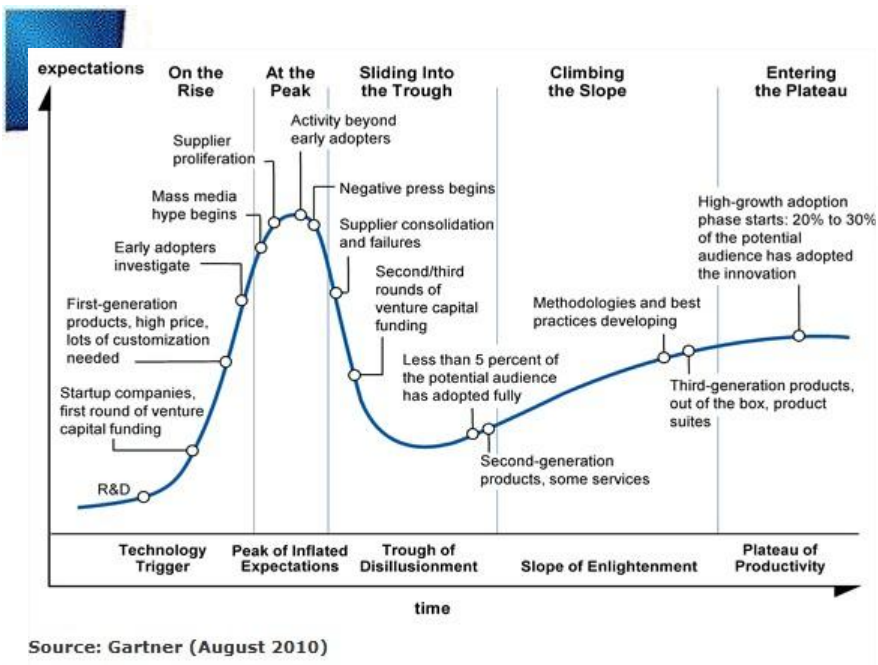
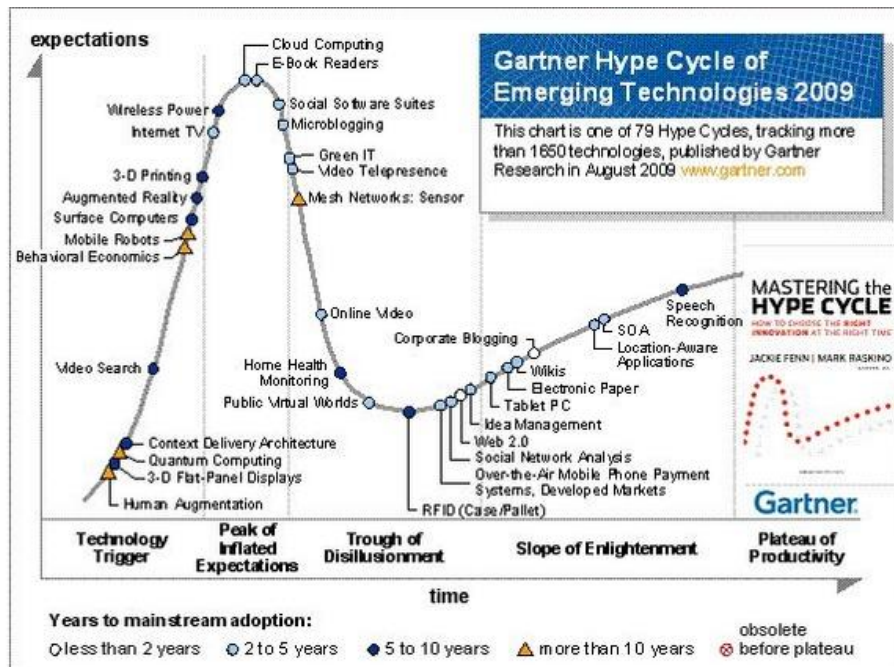
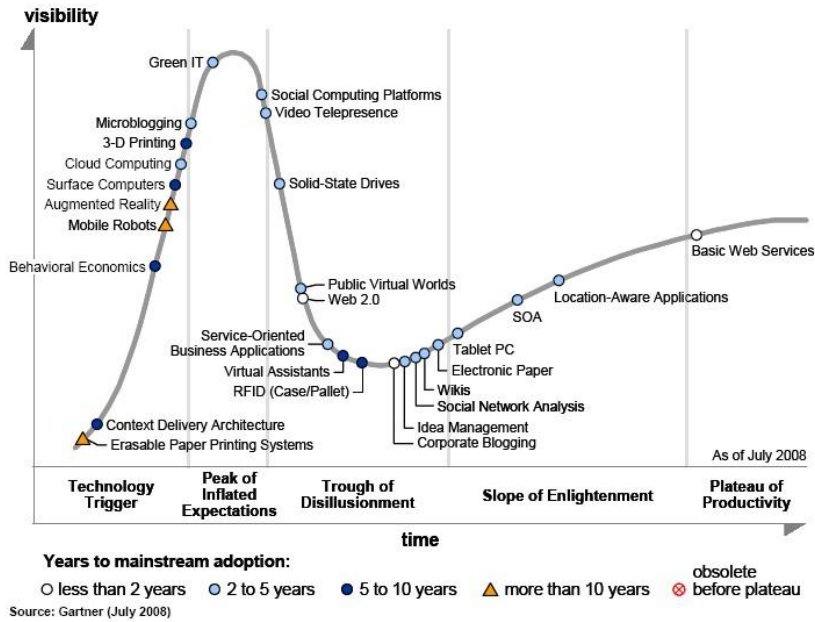
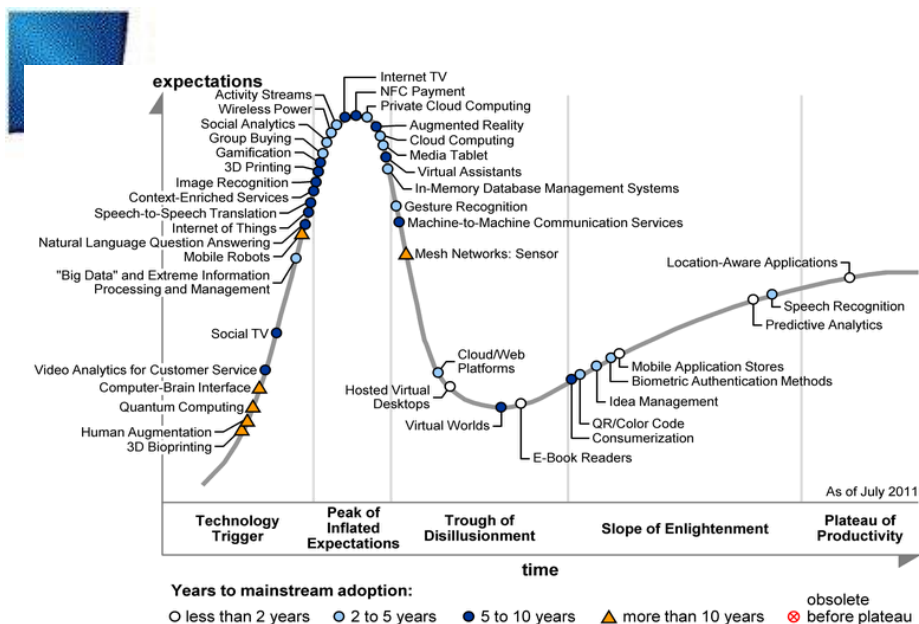
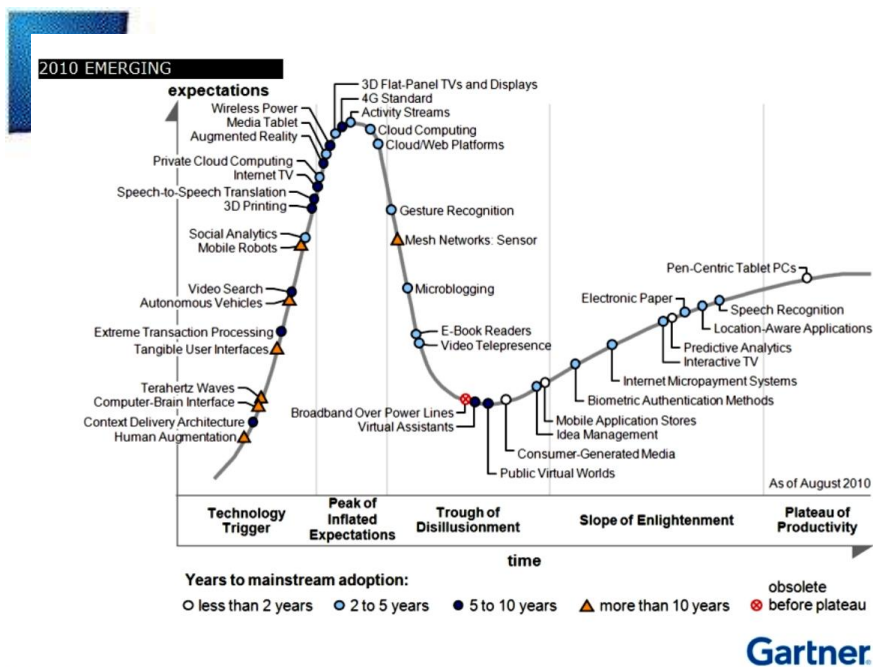


Figure 1. Hype Cycle for Emerging Technologies, 2008







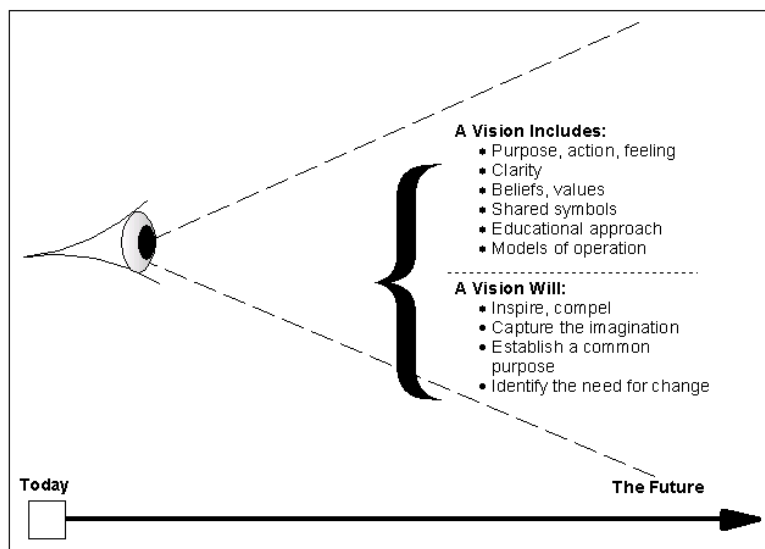


## Strategy and ... Mission, Values, Vision, ....

Mission:	Why we exist?
Values:	What we believe in?
Vision:	What we want to be?
Strategy:	Our game plan

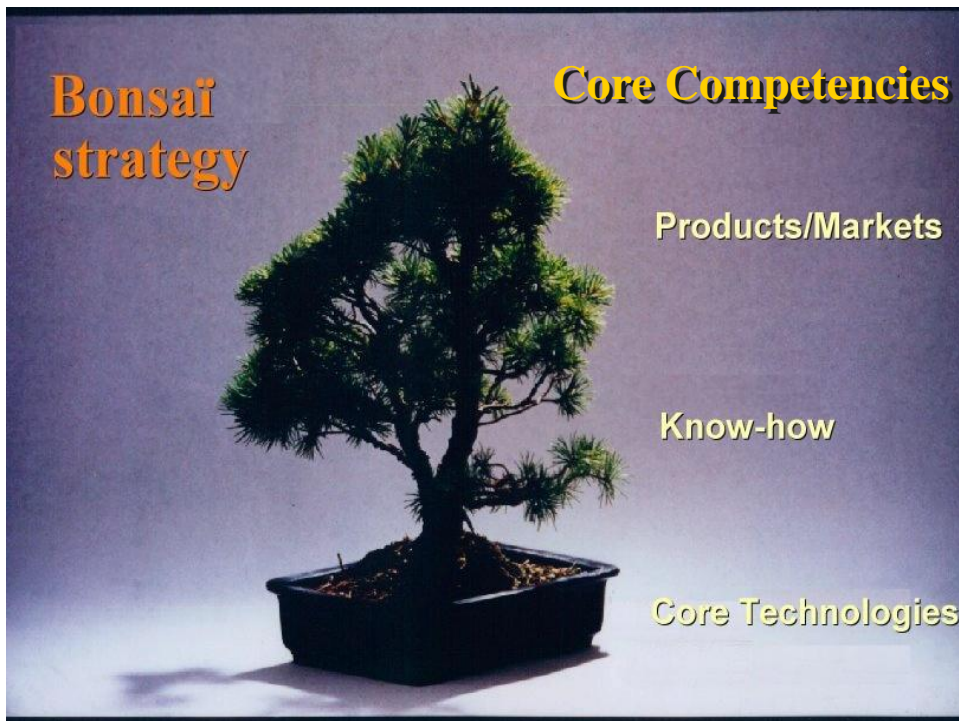
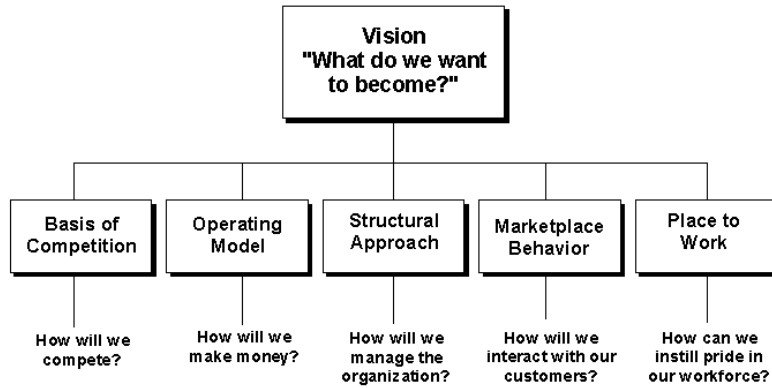


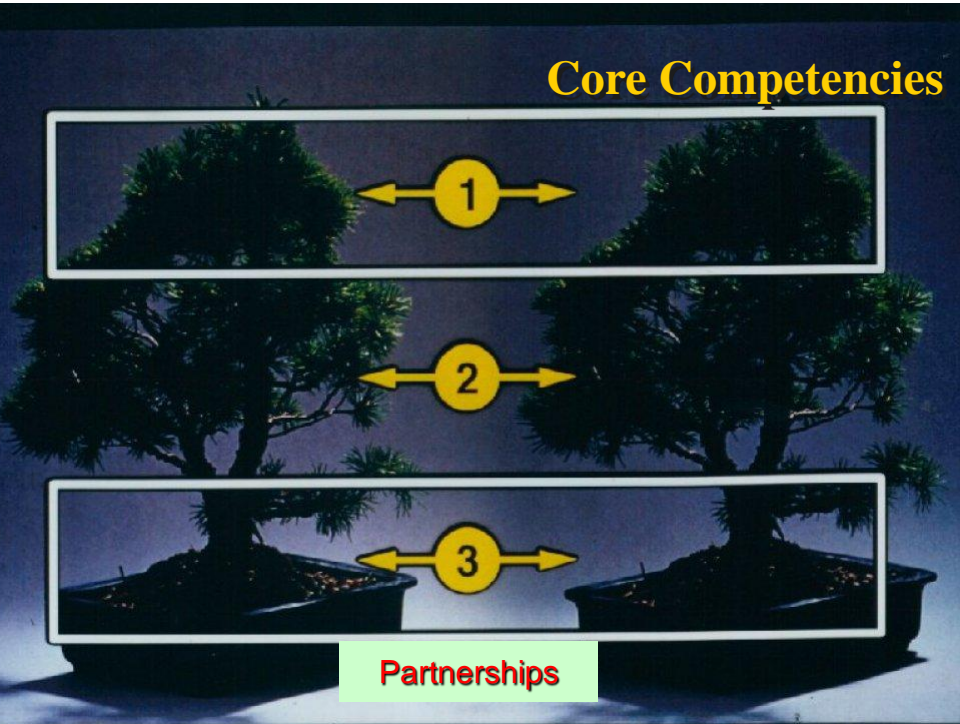
## What is a business vision?



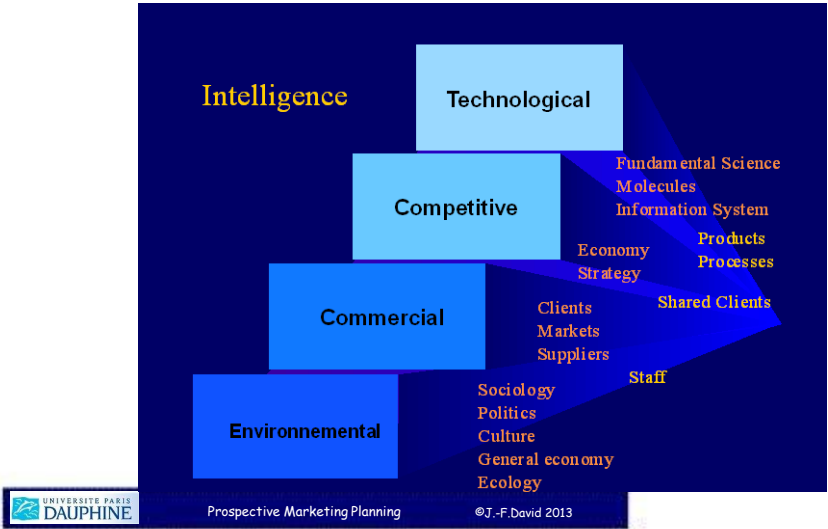


To develop a vision, an organization should address 5 basic business concepts





**Intelligence...**

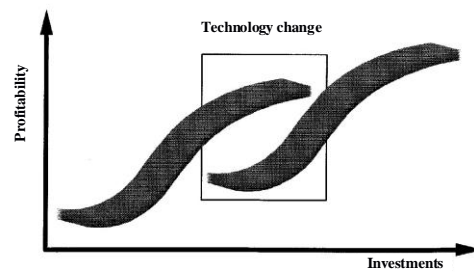






## Strategic change...

When for technology change...

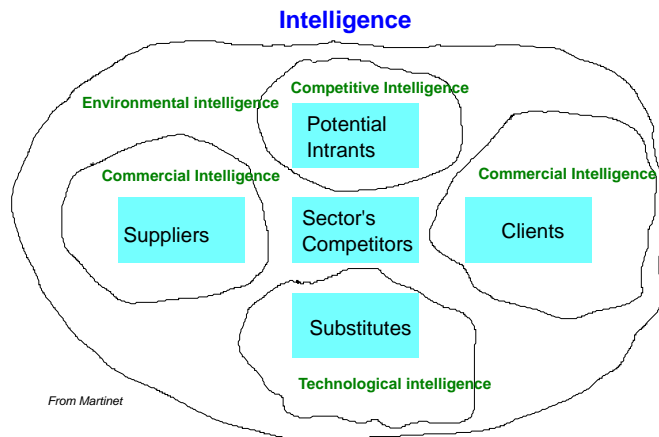


## Strategic change...

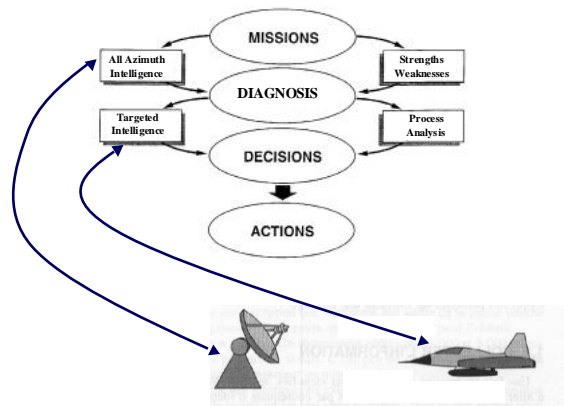
		TECHNOLOGY	
		OLD	NEW
U S A G E	OLD		Q
	NEW	DIVERSIF.	BREAK THROUGH



## Porter again...



## Two type of intelligence, of scanning...





## Spying...?

95% of useful information can be obtained by intelligence

black information	for bidden	for bidden	espionage
	intelligence	intelligence	dangerous nonsense
	intelligence	costly nonsense	dangerous nonsense
gray information			
white information			
	open	organized & deontological	illegal
	technique used		



The Society of Competitive Intelligence Professionals

SCIP's European Conference 03  
22-24 October, 2003, London, UK



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»The Intelligent Use of Business Analysis SCIP European Conference & Exhibit '03 22-24 October, 2003

»Masters of CI Series - December 4-5, 2003 New York, NY  
A two day series with Dr. Ben Gilad

### Publications

### Jobs

»Job Marketplace  
»Search Open CI Positions  
»Search for CI Professionals  
»Post a Job  
»Post Yourself  
»Job Descriptions  
»Executive Recruiters  
»Links to Career Websites

### CI Resources

#### SCIP Code of Ethics for CI Professionals

- To continually strive to increase the recognition and respect of the profession.
- To comply with all applicable laws, domestic and international.
- To accurately disclose all relevant information, including one's identity and organization, prior to all interviews.
- To fully respect all requests for confidentiality of information.
- To avoid conflicts of interest in fulfilling one's duties.
- To provide honest and realistic recommendations and conclusions in the execution of one's duties.
- To promote this code of ethics within one's company, with third-party contractors and within the entire profession.
- To faithfully adhere to and abide by one's company policies, objectives, and guidelines.



## *Marketing' is all about markets ....*

A 'market' exists when:

- Customers
  - who are addressable;
  - with definable needs
  - and an ability and willingness to pay

...come together with...

- A supplier or suppliers
  - who understand those needs;
  - have products or services which can meet them;
  - which can be supplied profitably

*'Come together' implies 'Location' (though that might be cyberspace)*



## Definitions

**" Marketing is the management process which identifies, anticipates and supplies customer requirements efficiently and profitably."**

*The Chartered Institute of Marketing.*

**"Marketing encompasses the entire business. It is the whole business seen from the point of view of the final result, that is, the Customer's point of view. Concern and responsibility for marketing must therefore permeate all areas of the enterprise."**

*Peter F Drucker 1954.*

"Keeping the customer happy and the competitor miserable"



## Marketing dans T.L.F.

### ■ **MARKETING**, subst. masc.

**ÉCON., COMM.** Ensemble des études et des actions qui concourent à créer des produits satisfaisant les besoins et les désirs des consommateurs et à assurer leur commercialisation dans les meilleures conditions de profit. *Le marketing comprend toutes les activités qui dirigent les produits du producteur au consommateur. Ces activités incluent, en plus de la vente, des fonctions telles que l'achat, le transport, l'entreposage, la finance, la publicité, etc.* (J.-C. CHEBATH, B.-G. SIMARD, *Le Vendeur ce méconnu ds Comm.*, sept. 1971, p. 22, col. 2).

**P. méton.** Service du marketing, dans une entreprise. *Chez Pier Import 24 magasins en France dont les deux tiers à Paris on joue à fond la carte exotique. «Nous traitons 70 % de nos importations nous-mêmes, sans passer par aucun intermédiaire,» précise M. Jean-Pierre Martin, directeur du marketing. Là-bas, sur place, des agents contrôlent les fabrications. Certains artisans locaux sont financés par lettre de crédit* (*Le Monde dimanche*, 10 mai 1981, p. 4).

**En appos. avec valeur adj. inv.** Qui correspond à, qui est en rapport avec cet ensemble d'études et d'actions. *Esprit marketing; actions marketing; objectifs marketing* (CIDA 1973).

**Dans le domaine pol.** Une firme de conseillers en propagande, spécialisée dans le «marketing politique», avait été chargée par M.L. de «vendre» sa candidature (P. VIANSSON-PONTE, *Hist. de la République gaullienne*, 1971 ds GILB. *Mots contemp.* 1980). *Le marketing électoral. Combien coûte une campagne? Combien de candidats aux législatives 1973 ont fait appel aux spécialistes du marketing? Existe-t-il une méthode scientifique pour améliorer un score électoral?* (*Expansion*, févr. 1973 ds GILB. *Mots contemp.* 1980).

**Rem. 1.** Synon. *marchéage* (d'apr. BRANC. *Écon.* 1978), *mercatique* (*ibid.*). 2. „Traductions proposées:

Pour le sens large: *commercialisation*; pour le sens restreint: techniques commerciales, *stratégie commerciale* (...). Les organisations internationales emploient déjà le mot «commercialisation»

(COMITE D'ÉTUDE DES TERMES TECHN. FR., *Termes techn. fr.*, Paris, Hermann, 1972, p. 87 et 163). 3. L'Académie Française (Communiqués sur le voc. techn. et industr. des 6 et 20 avr. 1967) condamne ce „terme étranger”, désignant les „opérations d'études et de développement de la vente d'un produit sur un marché” et propose l'équivalent français *commercialisation*.

**Prononc.:** [ ]. **Étymol. et Hist.** 1944 (R. SERVOISE, *L'Étude sc. des marchés*, 41 ds HÖFLER *Anglic.*). Empr. à l'angl. *marketing*, dér. de *to market* «faire son marché, acheter et vendre», de *market* «marché» empr. à l'anglo-normand, correspondant au fr. *marché*. L'usage actuel du terme dans le monde des affaires s'est établi à la fin du XIXe s. et a pris une extension particulière aux États-Unis (cf. NED et NED Supp. 193). Il a été adopté par le fr. Bte. GUILLOTIN (N). *Marketing, commercialisation, mercatique* Prospective Marketing Planning 11-217. *Marketing* 1974, pp. 594-595.



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## Marketing?



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## Marketings?

Buzz (marketing)  
Marketing amont  
Marketing aval  
Marketing d'étude, stratégique, terrain  
Marketing de l'offre  
Marketing de réseau  
Marketing des services  
Marketing digital  
Marketing direct  
Marketing électronique  
Marketing expérientiel  
Marketing global  
Marketing humanitaire  
Marketing industriel  
Marketing international  
Marketing interne  
Marketing local

Marketing-mix ou plan de marchéage  
Marketing one-to-one (business to business)  
Marketing orienté client  
Marketing politique  
Marketing relationnel  
Marketing RH  
Marketing sportif  
Marketing de combat  
Marketing de persuasion  
Marketing sensoriel  
Marketing social  
Marketing urbain  
Cybermarketing  
Neuromarketing  
Géomarketing  
Street marketing  
Télémarketing  
Trade-marketing  
Wwwmarketing  
Permission marketing  
Publicité et téléphone mobile



## Marketing definitions?

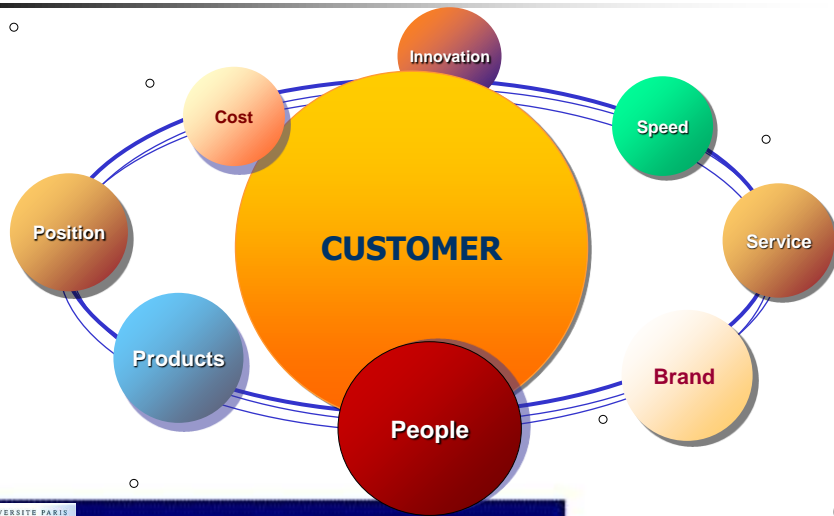
- (1) Marketing, response to consumer expectations  
"Meeting consumer expectations profitable way"  
--> key concept of "segmentation" (important databases)
- (2) Marketing as a strategic guide for company  
"The goal is no longer to respond to customer needs but choose the domains in which we will act"
- (3) Marketing as a management function of exchange processes  
gift, tribute, exchange symmetry

And all versions Marketing

Tribal Marketing, Marketing link or societal  
Marketing warrior or warketing  
Marketing Ethics  
Multisensory marketing, ...  
Marketing customer relationship management (CRM)  
Marketing "ethnic!"  
and internal marketing



## THE SATELLITES



Clients, sure, but not only ! :

Key exchanges with other internal and/or external groups



The Six Markets Model, Adrian Payne.



## Definition ?

- Market
  - the set of "clients"...
- Segmentation
  - Homogeneous groups, as seen by organization...
- Key market
  - Choice of privileged market
- Positioning : a will to "differentiate"
  - an intent / a process / a result...
  - " the nail" (strategic marketing)
- Implementation
  - " the hammer" (operational marketing)



## Two marketing visions...

### Transaction marketing:

A potential supplier (of products, services, ideas, ..) invents and deploys a process, trying to convince a potential client to make a win-win transaction.

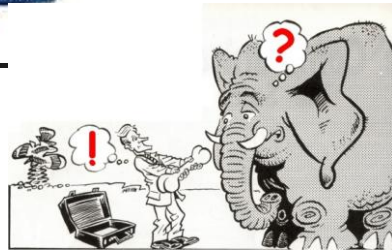
This process can imply some negotiations

### Relationship marketing

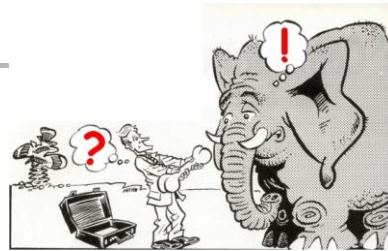
A supplier builds and manage confident long term relations with a set of partners/clients, the objective being enabling repetitive win-win transactions. This process creates a marketing network, becoming one of the main supplier asset.



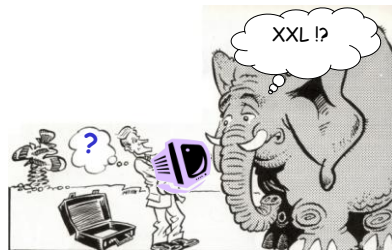
## Demand, Offer, Desire, ... Marketing?



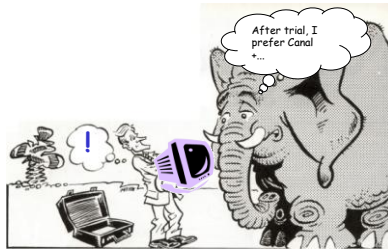
"Offer" Marketing pushes its product/services...



"Demand" Marketing start from client's needs, pull mode...



"Desire" Marketing plays on hidden desires...



"Creative" Marketing plays on clients objections...

## The role of marketing

- To determine, for an organisation, what should be sold (Product), to whom (customer segmentation), at what price (Price), where/ through which channels (Place) and how (Promotion) , in order to meet the organisation's strategic objectives.

Product – WHAT?

Price – HOW MUCH?

Place/distribution – WHERE?

Promotion – WHY?

(or 4C's Customer need / Cost / Convenience / Communication )

Basics... 2 more differentiators: People Processes

- To create an identity for the organisation or product (Brand) in which promotional expenditure can be vested
- Marketeers set Marketing Strategy and may help inform Organisation strategy, but do not set the latter.



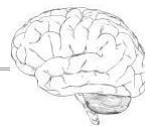
## Marketing Functions

- Strategy and Planning
- Market & Business analysis
  - Competitor tracking
- Channel development (with sales)
- Advertising and Promotion (inc. Brand) – known often as 'Marketing Communications'.
- Sales support
- Pricing
- (Product Development and Management)
- Marketing operations (the delivery of marketing initiatives)



"What do you want to do?"

"I want to work in Marketing !"



Marketer

Vendor

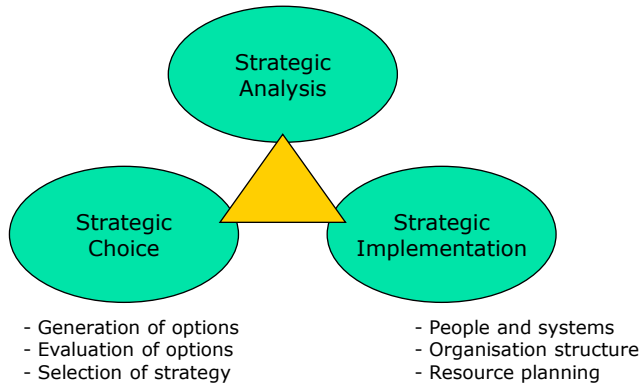
Sales rep



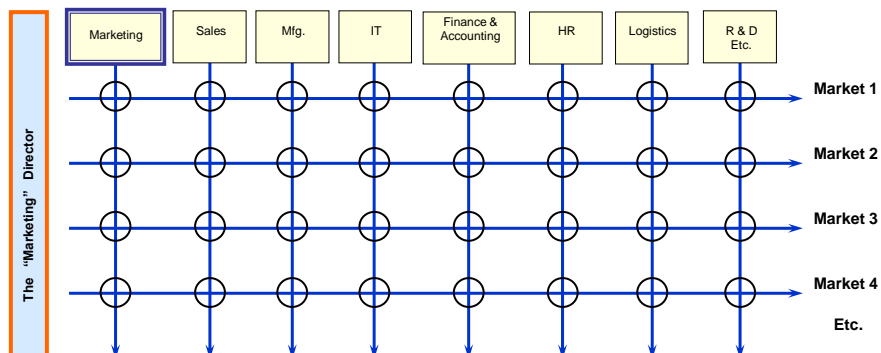


## The process

- The Environment
- Expectations, objectives, power and culture
- Resources

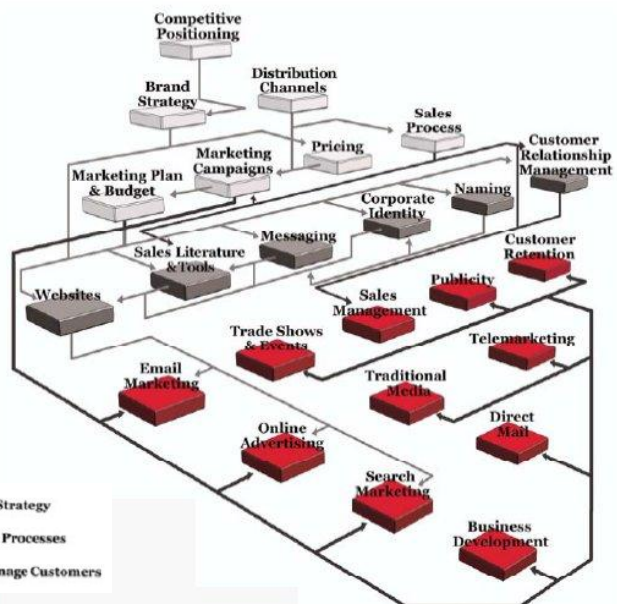
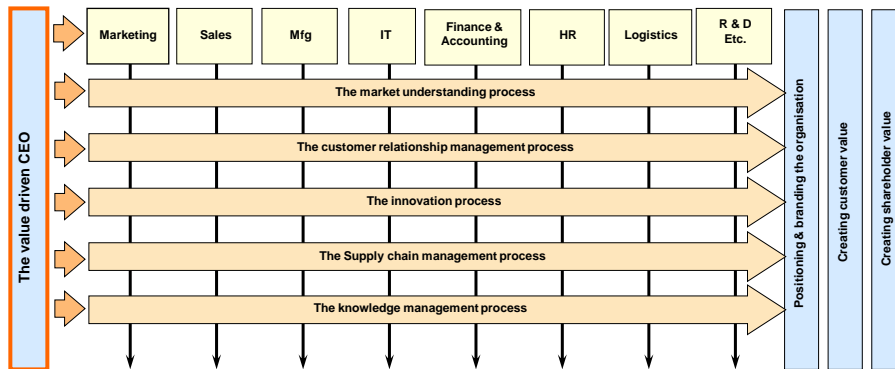


## The market understanding process





## The market understanding processes



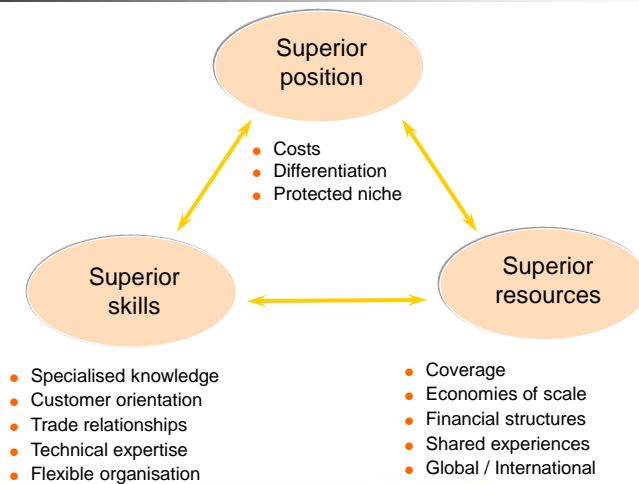


## Successful Marketing

- 1- Understand Customer Orientation
- 2- Understand the sources of competitive advantage
- 3- Understand the Environment (opportunities and threats)
4. Understand competitors
5. Understand Market Segmentation
6. Understand Your Own Strengths and Weaknesses
7. Understand the dynamics of product/market evolution
8. Understand your portfolio
9. Set Clear Strategic Priorities and Stick to Them



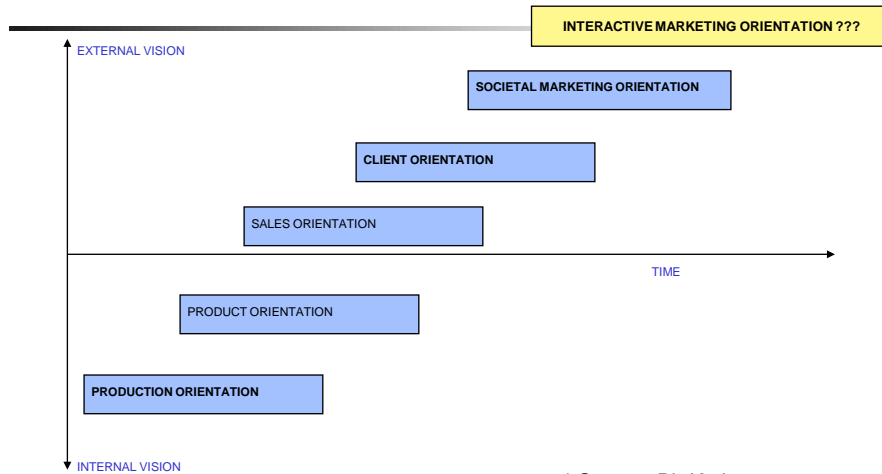
## Competitive advantage





## Marketing is a culture...

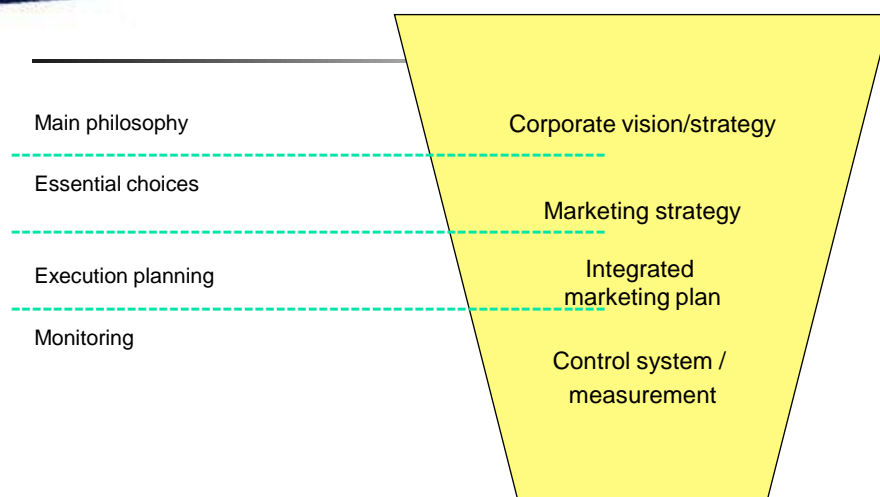
Organizations Marketing cultures trends



\* Source: Ph.Kotler

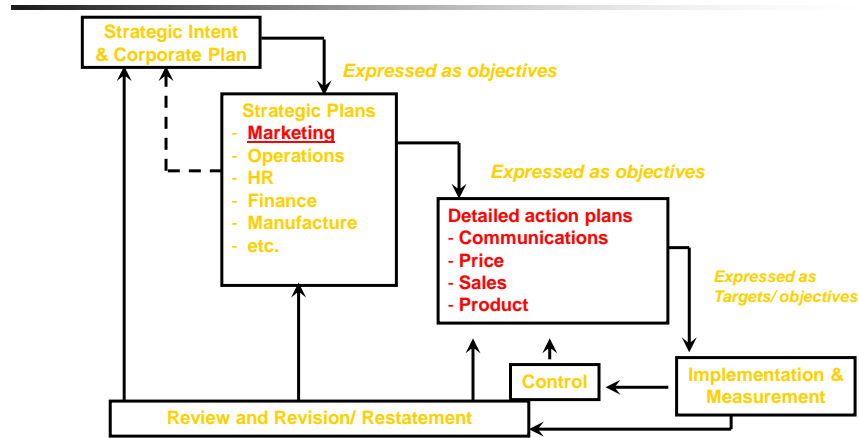


## Marketing is a management process..





## The corporate planning cycle



Where strategic objectives are planned-for over a time period longer than the budget cycle, interim milestones need to be set.

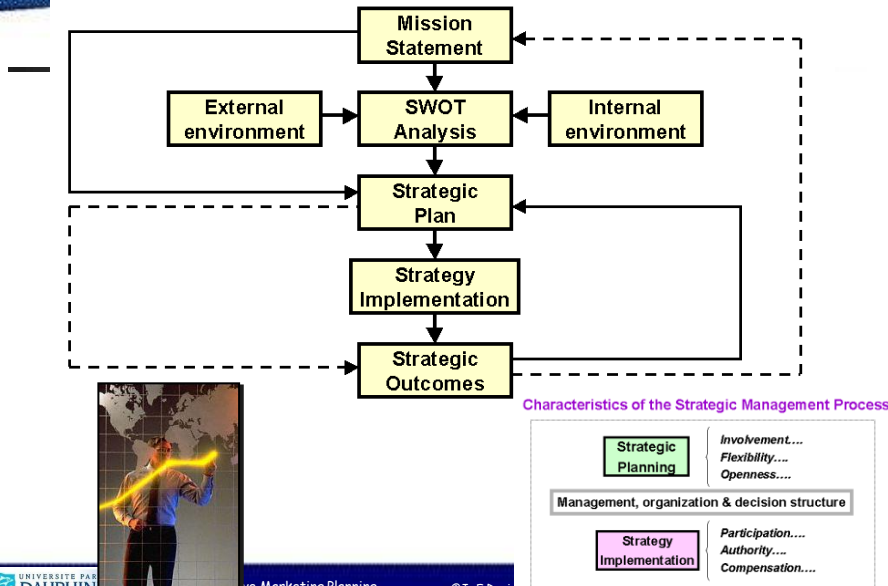


## What is Strategy?

### Translating a Mission into Desired Outcomes



## The Strategic Management Process



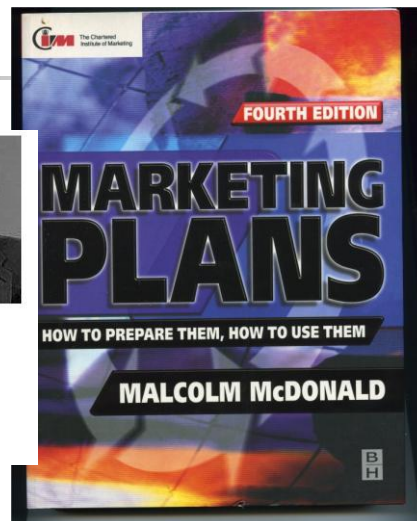
Malcolm McDonald MA(Oxon) MSc PhD D.Litt FCIM FRSA

Emeritus Professor

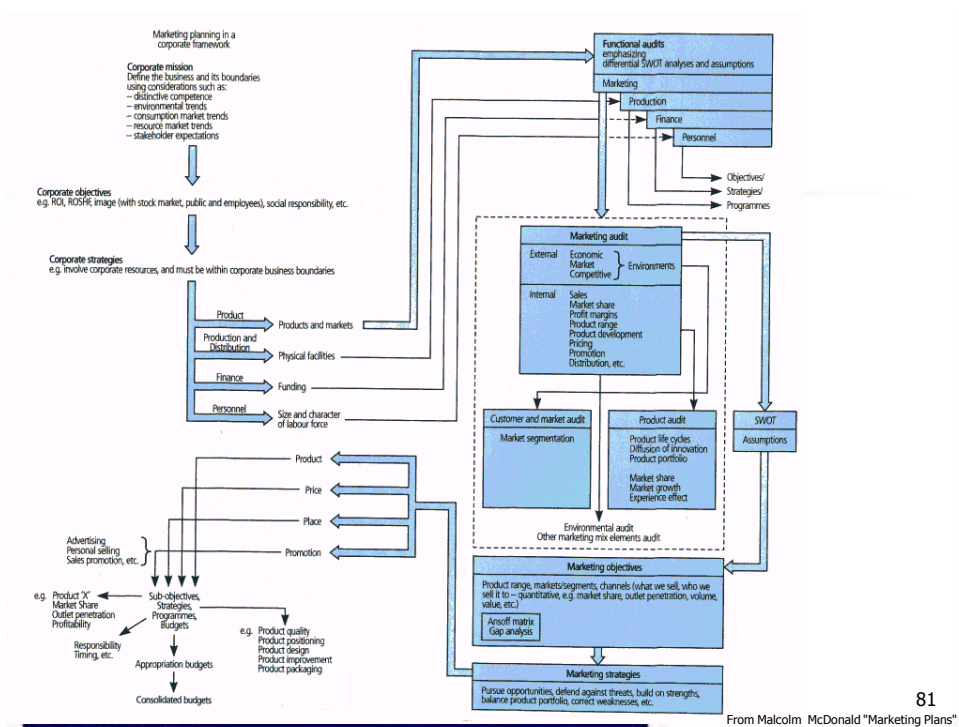
Marketing

Malcolm, until recently Professor of Marketing and Deputy Director Cranfield School of Management with special responsibility for e-business. He is a graduate in English Language and Literature from Oxford University, in Business Studies from Bradford University Management Centre, and has a PhD from Cranfield University. He also has a Doctorate from Bradford University. He has extensive industrial experience, including a number of years as Marketing Director of Canada Dry. During the past twenty seven years he has run marketing seminars and workshops in the UK, Europe, Japan, India, the Far East, Australia, South America, South Africa, Brazil, China and the U.S.A. He has written thirty eight books, including the best seller "Marketing Plans; how to prepare them; how to use them" and many of his papers have been published. His current interests centre around the use of information technology (e-business) in advanced marketing processes and global best practice key account management.

m.mcdonald@cranfield.ac.uk







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From Malcolm McDonald "Marketing Plans"

The marketing planning process	The output of the marketing planning process Strategic marketing plan contents	Marketing theory (Structures, frameworks, models)	Financial theory / Structure
Phase 1 Company Strategy	Mission statement Financial summary		
Phase 2	Market overview <ul style="list-style-type: none"> <li>Market structure</li> <li>Market trends</li> <li>Key market segments</li> <li>Gap analysis</li> </ul>	Marketing audit Market research Market segmentation studies Gap analysis Product life cycle analysis Diffusion of innovation Ansoff matrix Forecasting Market research	Competitor analysis Industry/sector analysis Risk evaluation Ratio analysis, valuation studies Cost of capital NPV analysis Project evaluation Life cycle costing
	Opportunities Threats <ul style="list-style-type: none"> <li>(By product)</li> <li>(By segment)</li> <li>(Overall)</li> </ul>	Issue management	Profitability analysis by products / segments Comparative analysis of competitor products Experience curves and cost structures
	Strengths Weaknesses Issues to be Addressed <ul style="list-style-type: none"> <li>(By product)</li> <li>(By segment)</li> <li>(Overall)</li> </ul>	Key success factors matrix Market research Market segmentation studies	
	Portfolio summary	B.C.G. Matrix Directional policy matrix	Cash flows and risk evaluation Sensitivity analysis
	Assumptions	Downside risk assessment	Sensitivity analysis Decision trees Probability theory
Phase 3 Strategy Formulation	Marketing Objectives <ul style="list-style-type: none"> <li>(By product)</li> <li>(By segment)</li> <li>(Overall)</li> </ul>	Porter matrix Ansoff matrix Bcg matrix Directional policy matrix Gap analysis	Performance targets / ratios Cost, price, volume (CPV) analysis Marginal and absorption costing Activity base costing
	Marketing Strategies <ul style="list-style-type: none"> <li>(4 x 4 ps)</li> <li>(Positioning/branding)</li> <li>Product</li> <li>Price</li> <li>Promotion</li> <li>Place</li> </ul>	Market segmentation studies Market research Response elasticities McDonald PRODUCTIVITY MATRIX Blake mouton matrix	Budgeting and financial planning Zero base budgets
Phase 4 Resource Allocation And monitoring	Resource Requirements	Forecasting Budgeting Measurement and review	Integrated financial planning Limiting resource analysis

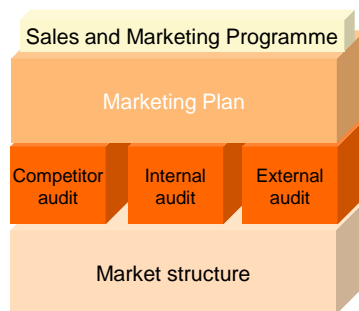
82



The marketing Planning process	The output of the marketing planning process Strategic marketing plan contents	Marketing theory (Structures, frameworks, models)	Financial theory / Structure
<b>Phase 1</b> Goal setting	Mission statement Financial summary		
<b>Phase 2</b> Situation review	Market overview <ul style="list-style-type: none"> <li>Market structure</li> <li>Market trends</li> <li>Key market segments</li> <li>Gap analysis</li> </ul>	Marketing audit Market research Market segmentation studies Gap analysis Product life cycle analysis Diffusion of innovation Ansoff matrix Forecasting Market research	Competitor analysis Industry/sector analysis Risk evaluation Ratio analysis, valuation studies Cost of capital NPV analysis Project evaluation Life cycle costing
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	Issues to be Addressed		Experience curves and cost structures
	Portfolio summary	B.C.G. Matrix Directional policy matrix	Cash flows and risk evaluation Sensitivity analysis
	Assumptions	Downside risk assessment	Sensitivity analysis Decision trees Probability theory



## The building blocks for successful marketing



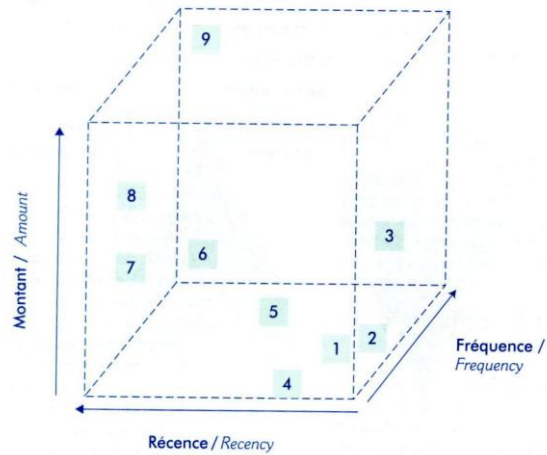
Adapted from Professor Malcolm McDonald

...but if the basic building block is unsound!

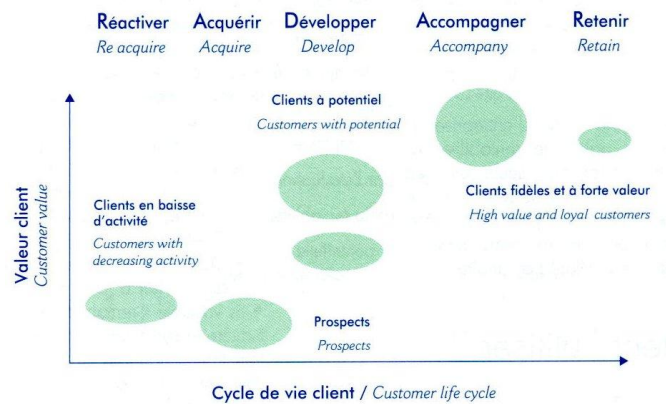




## Segmentation: RFM

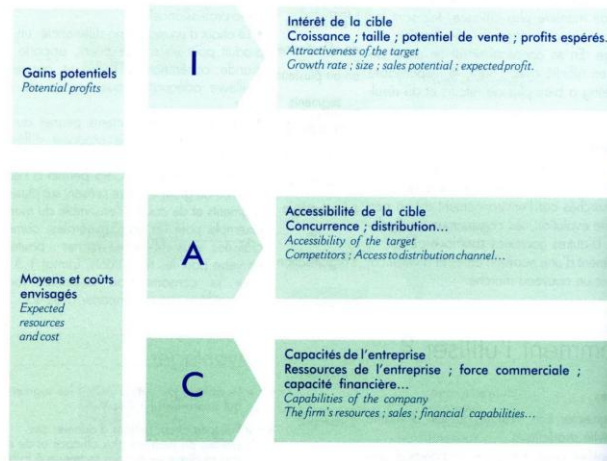


## Segmentation: Radar

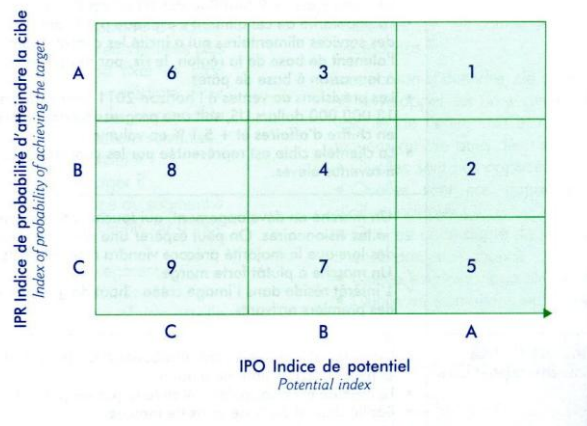




## Segmentation: IAC



## Segmentation: IPO / IPR





## The purpose of strategic marketing planning

**The overall purpose of strategic marketing planning, and its principal focus is the identification and creation of sustainable competitive advantage**

Adapted from Professor Malcolm McDonald



## Marketing plan

- Detailed plan of to whom you will sell your product, at what price, through which channels, and with the support of what kinds of sales and advertising.
- Includes a strategy, a mix, ways of measuring success, attention to staffing, and attention to costs.
- Summarized in the marketing functional strategy section of the business plan.



## Market Research

### How big is the market?

- Number of existing & potential clients
- Type of existing & potential clients
- Location of existing & potential clients

### What is the main market trend?

- Change in student requirements
- Change in technology
- Change in overall demand



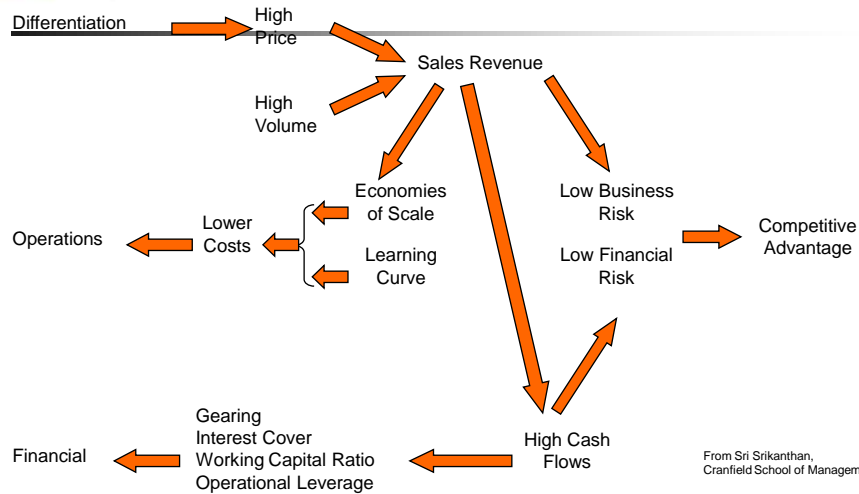
## Market Research

### Competition

- Number
- Type
- Location
- Marketing operations of competitors



## The route to Competitive Advantage



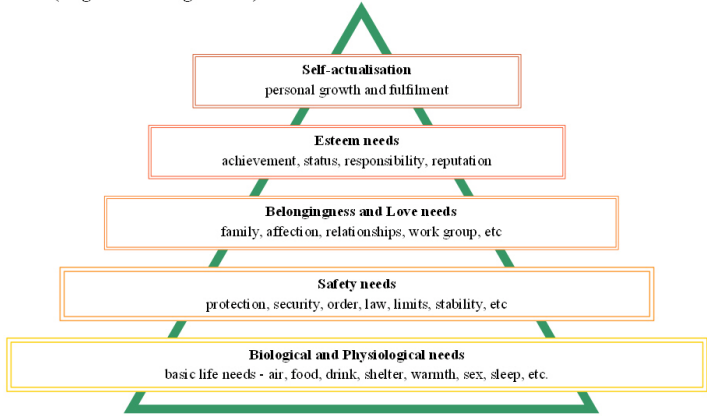
Adapted from Professor Malcolm McDonald



D'après A. Maslow.



Maslow's Hierarchy of Needs  
(original five-stage model)

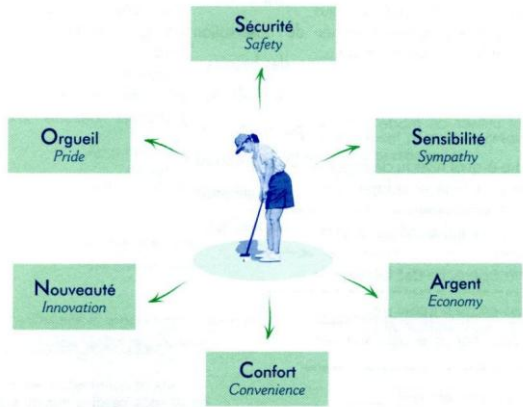


© alan chapman 2001-4, based on Maslow's Hierarchy of Needs

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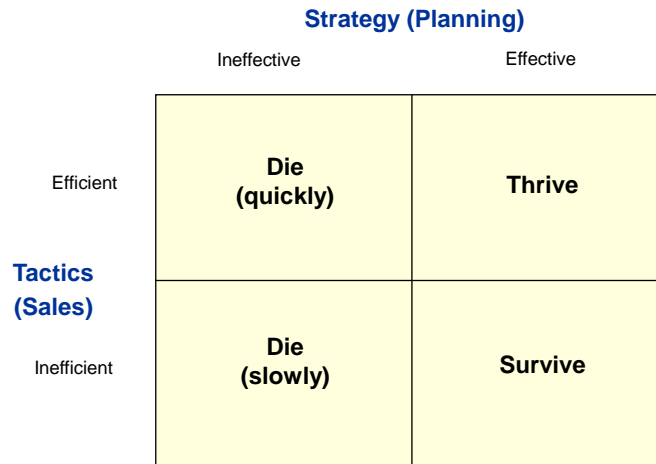


Client: SONCAS





## Planning vs Execution...



Adapted from: Professor Malcolm McDonald  
UNIVERSITÉ PARIS DAUPHINE

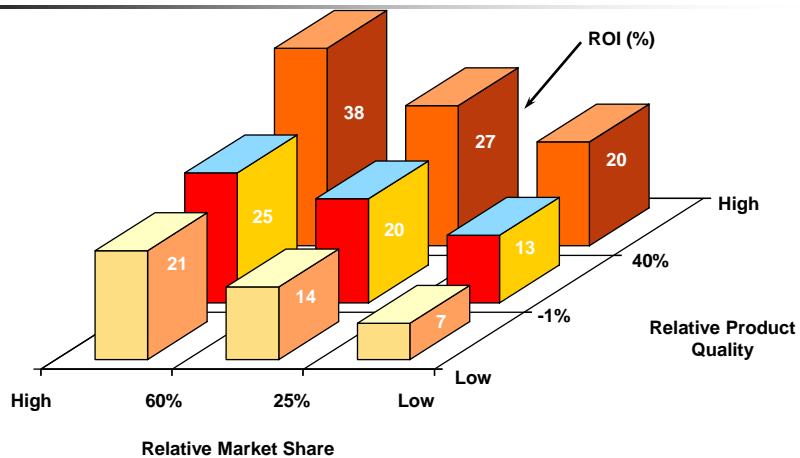
Prospective Marketing Planning

©J.-F.David 2013

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## Quality and share both drive profitability



Source: PIMS  
UNIVERSITÉ PARIS DAUPHINE

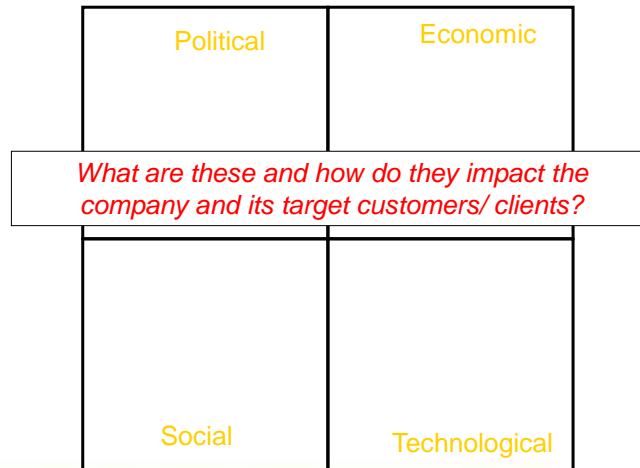
Prospective Marketing Planning

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## PEST Analysis



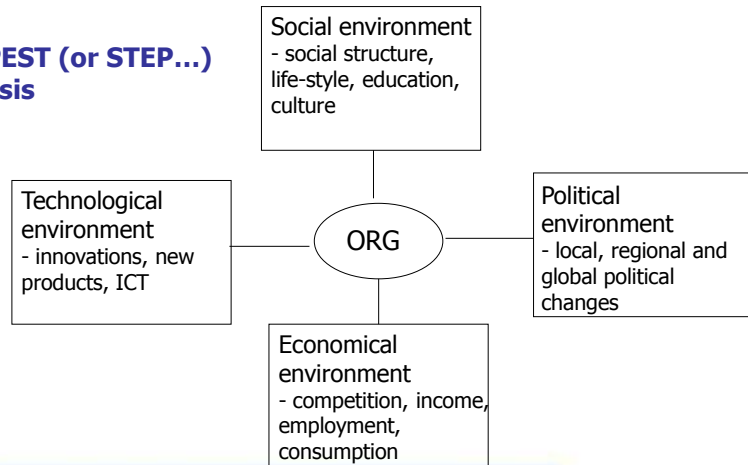
## PESTEL analysis...



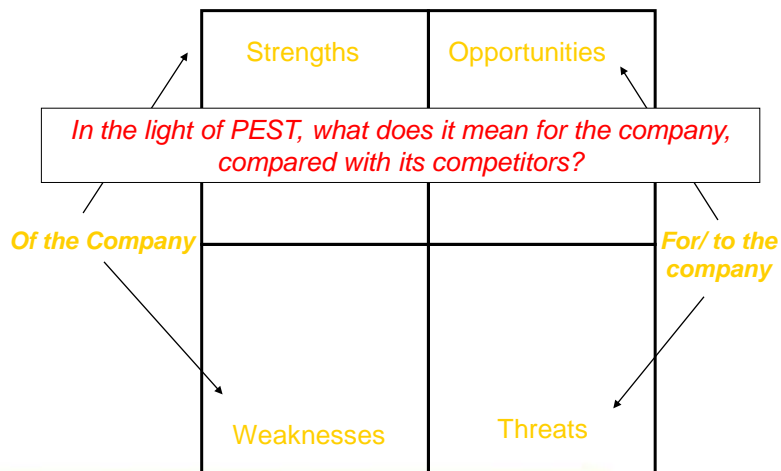


## The Strategy Process

### The PEST (or STEP...) analysis



## SWOT Analysis





## SWOT

Enjeux : Objet de l'analyse et contexte <i>Subject of SWOT analysis : subject of the analysis and context</i>	
Forces <i>Strengths</i>	Faiblesses <i>Weaknesses</i>
Avantage concurrentiel, positionnement, <i>competitive advantages, positioning</i> Innovation, <i>Innovative aspects</i> Prix, <i>Price, value</i> Niveau de qualité <i>Quality</i> .../...	Écarts de performance <i>Performance gaps</i> Vulnérabilités <i>Vulnerabilities</i> Mauvais résultats dans le cœur d'activités <i>Negative effects on core activities</i> Aspects financiers <i>Financial aspects</i> .../...
Opportunités <i>Opportunities</i>	Menaces <i>Threats</i>
Segments en croissance <i>Market developments</i> Faiblesses de concurrents <i>Competitors' vulnerabilities</i> Innovations technologiques <i>Technology development and innovation</i> Nouveaux marchés <i>New market</i> Partenariats <i>Partnerships</i> .../...	Cadre législatif peu favorable <i>Negative legislative effects</i> Stratégies offensives concurrentielles <i>Competitor intentions-various</i> Demande du marché en baisse <i>Market demand</i> Influences défavorables <i>Global negative influences</i> .../...



### The Strategy Process (example new educ product)

#### SWOT Analysis

Environment	Internal	Strengths	Weaknesses
		♦ High pass rate (CPA) ♦ High quality students	Lack of practical experience
	External	Opportunities	Threats
		High industry presence in the local area	Depressed local economy



## Match SW to OT

<div> <div>Internal Factors</div> <div>External Factors</div> </div>	Strengths (S)	Weaknesses (W)
	<div>SO Strategies</div> <div>Use strengths to take advantage of opportunities</div>	<div>WO Strategies</div> <div>Offset weaknesses to take advantage of opportunities</div>
	<div>ST Strategies</div> <div>Use strengths to avoid threats</div>	<div>WT Strategies</div> <div>Min. weaknesses to avoid threats</div>



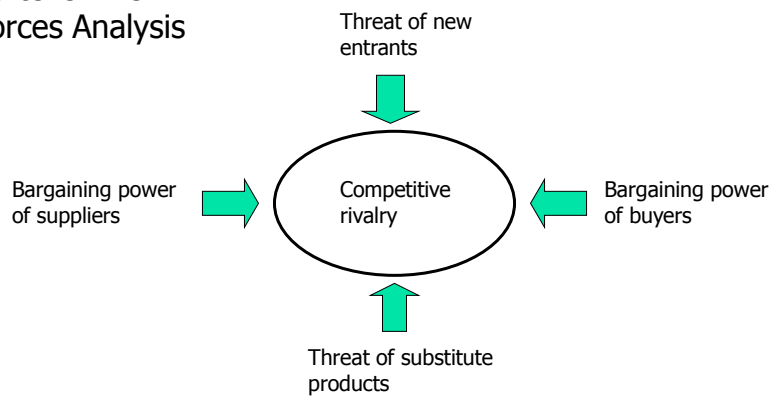
## SWOT benefits

- Identify and evaluate internally and externally the following:
  - Economic, social, political and technological aspects
    - Internal
      - Strengths
      - Weaknesses
    - External
      - Opportunities
      - Threats
- or... **Substantial Waste Of Time ???**

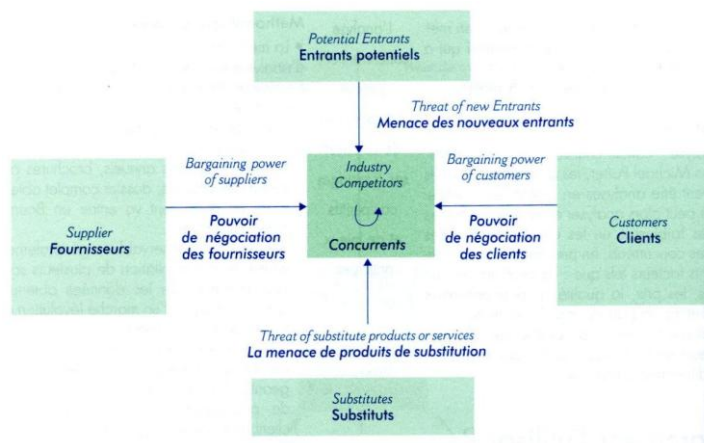


## The Strategy Process

### Porter's Five Forces Analysis

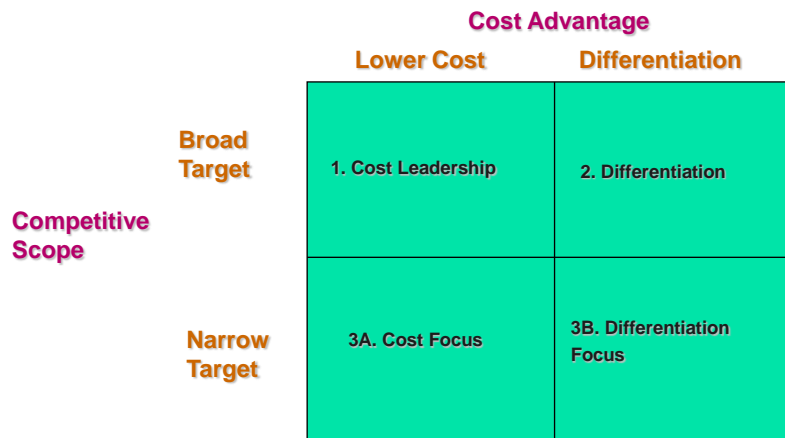


## Porter...

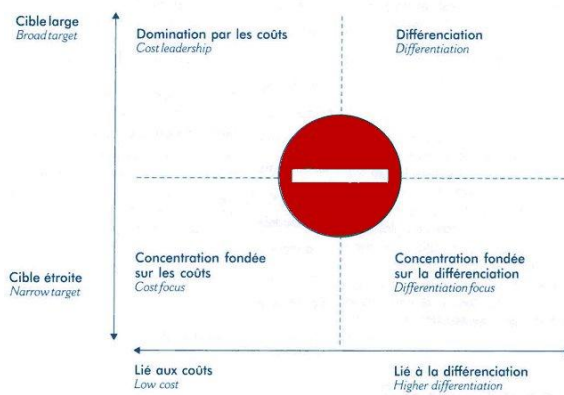




## Porter's generic strategies



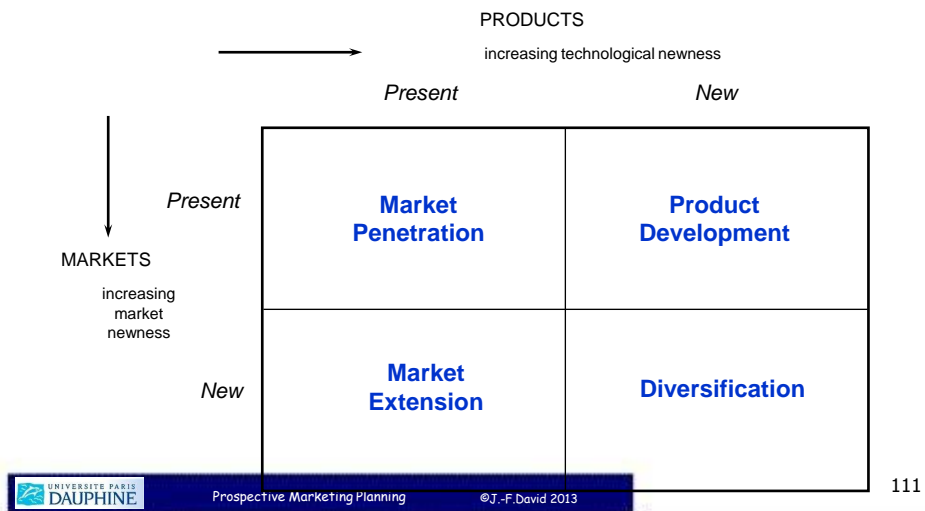
## Porter, generic strategies...



D'après M. Porter, *The competitive Advantage of Nations*,  
The Free Press, 1980.



## Ansoff matrix



## Ansoff...

Couple produit / marché Product /Market Matrix		
Produit Product	Actuel Present	Nouveau New
Marché Market		
Actuel Present	Pénétration de marché Market penetration	Développement de produit Product development
Nouveau New	Développement de marché Market development	Diversification Diversification

D'après Ansoff.



## And....

- \*Marketing communications
- \*Pricing
- \*Sales promotions
- \*Ad's
- \*Logos, brochures, catalogs, white papers, ...
  
- \*Planning
- \*Control
- \*Product Management
  
- \*CRM
- \*Networking
- \* ....

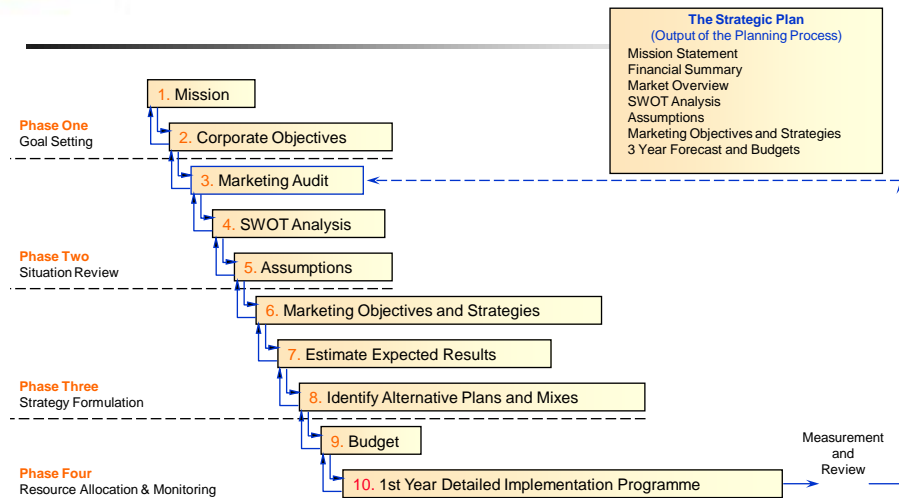


## MARKETING PLANNING PROCESS





## The ten steps of the strategic marketing planning process



## Business plan format

- Summary
- Historical situation / SWOT analysis / audit / background
- Where is the organisation going?
- How will the organisation get there? – Markets (Marketing plan)
- How will the organisation get there? – Finances
- How will the organisation get there? – Operations
- How will the organisation get there? – People
- List of assumptions
- Contingency plans
- Monitoring process - review and re-consideration of plan



## Business plan contents

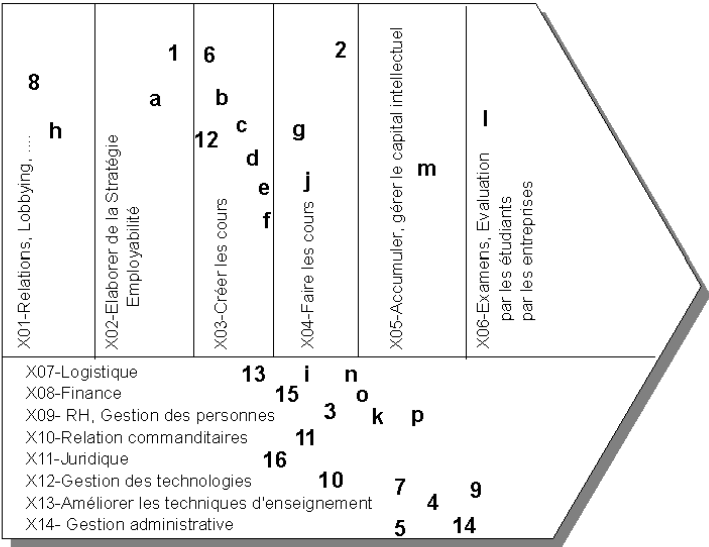
Marketing	Customers, products/services, promotion, competitors, pricing ...
Operations	Systems, equipment required, premises, problem areas, quality ...
Administration	Systems, policies, equipment ...
People	Numbers, skills, structure, availability, training, succession, culture ...
Finance	incomes/expenditures, profit/loss, balance sheets, sensitivity, bank balances, credit policy, investments needed ...



## Branding...

"In future, the most powerful brands will be customer-centric. Successful companies will know the customer and will be the customer's advocate"

Chaîne de valeur, "macro processus"



Sous-processus

CFA

- 1-Recruter les étudiants (inscriptions, ...)
- 2- Gérer l'étudiant (suivi, plannings, évaluations, examens, ...)
- 3- Gérer les problèmes et réclamations (étudiants, enseignants, ....)
- 4- Optimiser les outils de l'enseignant ( Outils de productivité, outils de publication, système d'administration, ...)
- 5- Gérer des enseignements (planification salles, planification des cours, ....)
- 6- Créer de nouveaux cours (études d'opportunités, accréditation, ....)
- 7- Développer les systèmes d'aide à la formation (EAO, enseignements à distance, ...)
- 8- Communiquer (anciens élèves, publications, plaquettes, conférences, salons, ...)
- 9- Optimiser les outils informatique de gestion (Messageries, videoconferences, BD, ...)
- 10- Optimiser les outils scientifiques (labos, matériels, ...)
- 11- Relations avec entités de contrôle ( ministères, ....)
- 12- Obtenir les financements
- 13- Services généraux (bibliothèques, cafétérias, ...)
- 14- Gérer le personnel (gestion, paye, ...)
- 15- Gérer la finance (Gestion actifs, locaux, budgets, facturations, recouvrements, ...)
- 16- Juridique

Enseignement

- a- Etudier l'opportunité du cours
- b- Développer le cours
- c- Faire accréditer le cours
- d- Sélectionner les enseignants
- e- Recruter les intervenants
- f- Développer les supports
- g- Préparer les examens
- h- Faire le Marketing
- i- Inscrire
- j- Faire le cours
- k- Tutorat, RH apprenants
- l- Evaluer les apprenants
- m- Créer/Maintenir le capital intellectuel
- n- Assurer la logistique (salles, matériel ,...)
- o- Gérer les budgets
- p- Relations humaines enseignant





## CRM

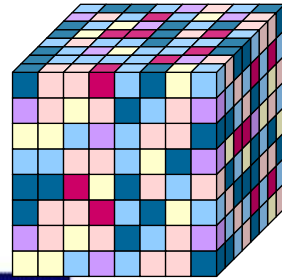
### One definition

'Attracting, satisfying and retaining profitable customers'

### Another definition (Professor Malcolm McDonald)

'The IT-enabled integration of data across multiple customer contact points to enable the development of offers tailored to specific customer needs'

Different needs in a market



# Routes to market

Who does what?

By product?  
By market?

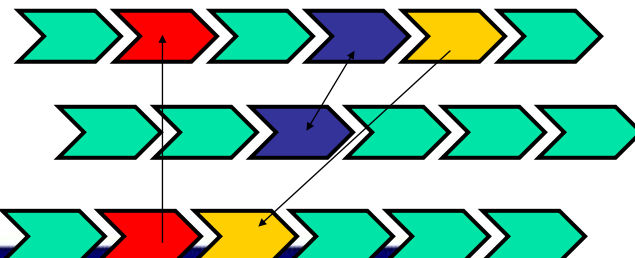
Call centers  
Face to face  
Marketing  
Production

Transaction cost...

Company

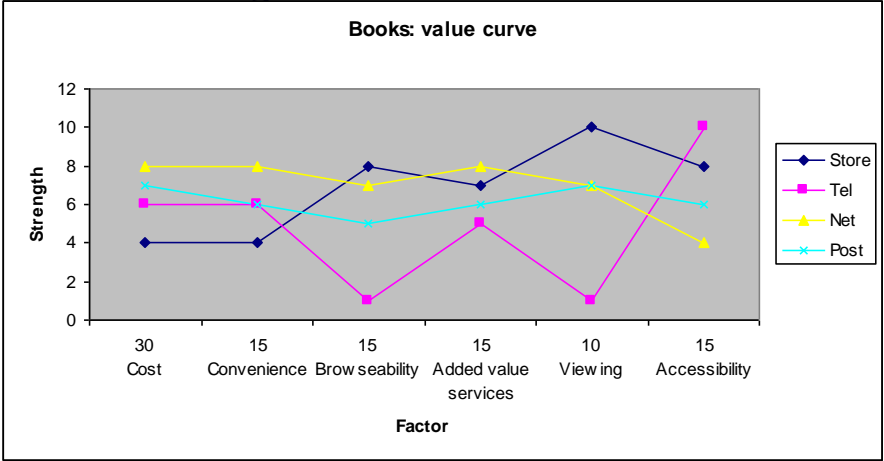
Partners 1

Partners n





# Choosing channels: the channel curve



Routes to Market Scenario Details

Legend

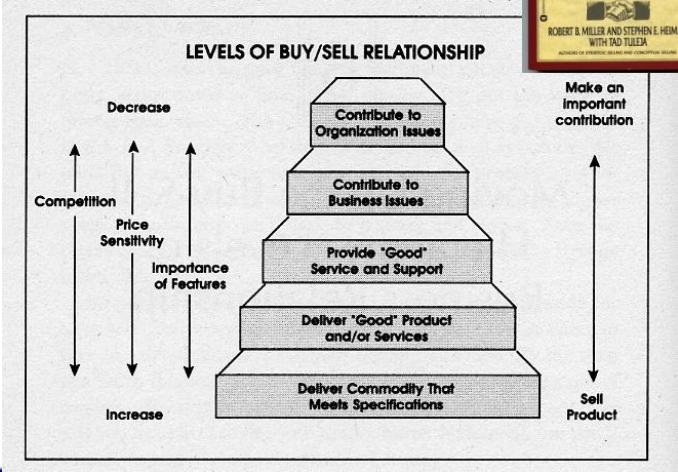
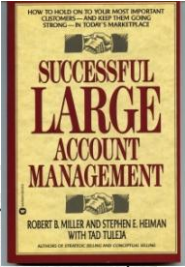
Buying Behavior: Mass Customization

Life Cycle: Solution

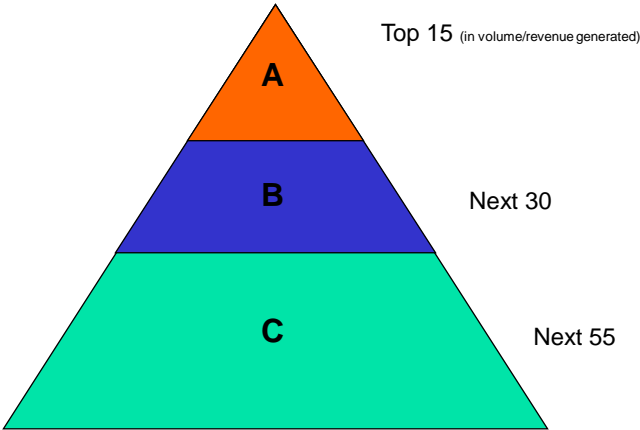
Routes	Life Cycle Stages					Avg
	Demand Generation	Pre Sales	Close the Deal	Deploy	Ongoing Support	
SS/1	R DMC	SS R INFL	SS R	ADM ITR IT	R ITR IT	4.4
SI/1	COM SI	SI	SI	SI	R ITR IT SI	4
SI/2	COM SI	SI	SI	VAD	R ITR IT SI	3.7
RES/1	DMC ELEC RES	ELEC RES INFL	RES	ITR IT RES	R ITR IT RES	3.9
RES/2	DMC ELEC VAD	ELEC RES VAD INFL	RES	ITR IT RES VAD	R ITR IT RES	3.9
SP/1	COM ELEC SP	SP INFL	SP	ITR IT SP	R ITR IT SP	4.5
SP/2	DMC ELEC VAD	SP VAD INFL	SP	ITR IT SP VAD	R ITR IT SP	4.5



Key Accounts

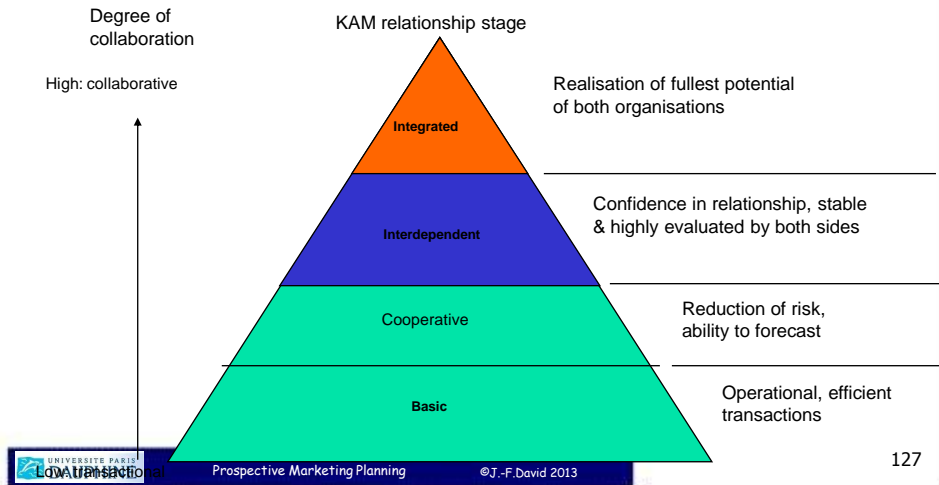


Key account preliminary categorisation





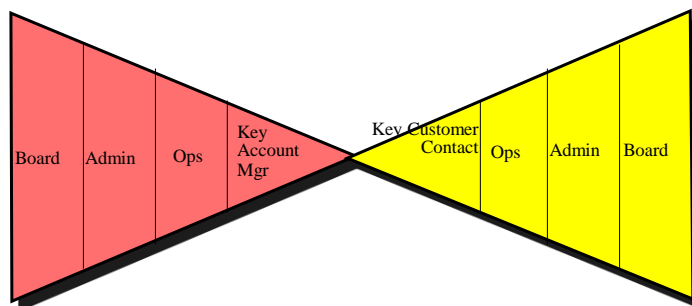
## Key account preliminary categorisation



## Basic KAM

Selling company

Buying company





## Wikinomics...

### pinko marketer job description

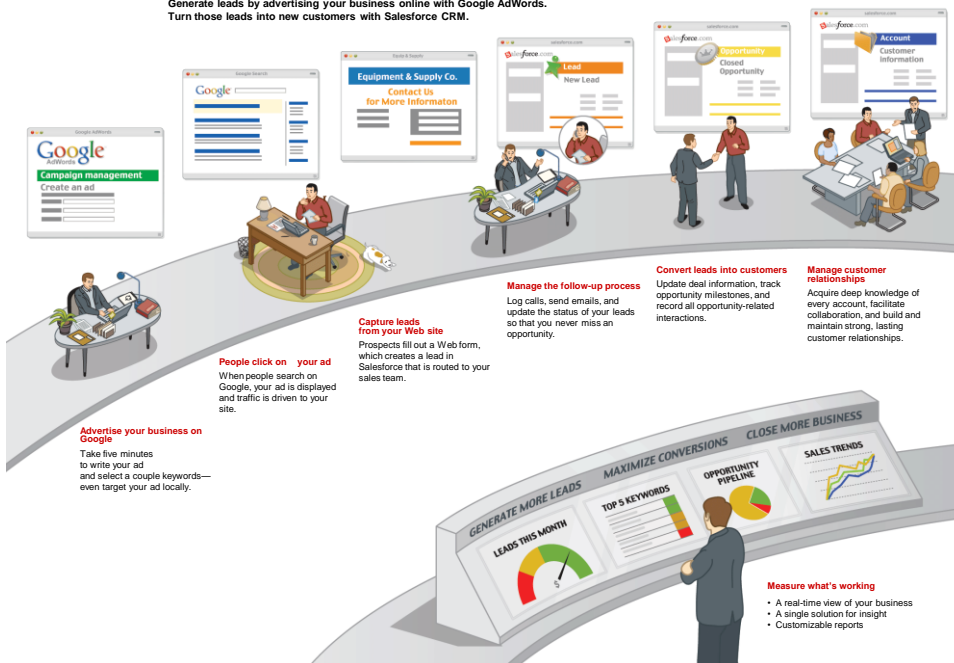
MARKETING DIRECTOR	PINKO MARKETER
Strategy, planning, research, media buys, project mgmt, brand development & mgmt, advertising & promotions	Creating passionate users...by listening, observing, being part of the community - an intently knowing what they will need next (see Kathy Sierra)
Focus on deliverables: cost per click, media planning within a given budget, ROI, etc.	Helping your community kick ass = \$next to nothing  Shifting your advertising budget to improving your product = priceless
Studies target markets, collects consumer data, predicts future market trends, conducts user testing, focus groups and customer feedback surveys.	Erm...talks to people. (Not too hard since s/he knows many of them personally.)
Uses words like: consumer, target, buyer, and user to describe customers.	Uses words like: Jennifer, tejas, Jeremy, Salim, Carol, Anni, Vigay, Tran, Lex, Mary, Joseph, Thomas, Ito, John, etc. to describe members of his/her community.

... and climate change has not yet redesigned economics but it probably will



## Acquire New Customers and Grow Your Business (Salesforce.com)

Generate leads by advertising your business online with Google AdWords.  
Turn those leads into new customers with Salesforce CRM.



# Sales and Marketing

## Process Map – Winter '08



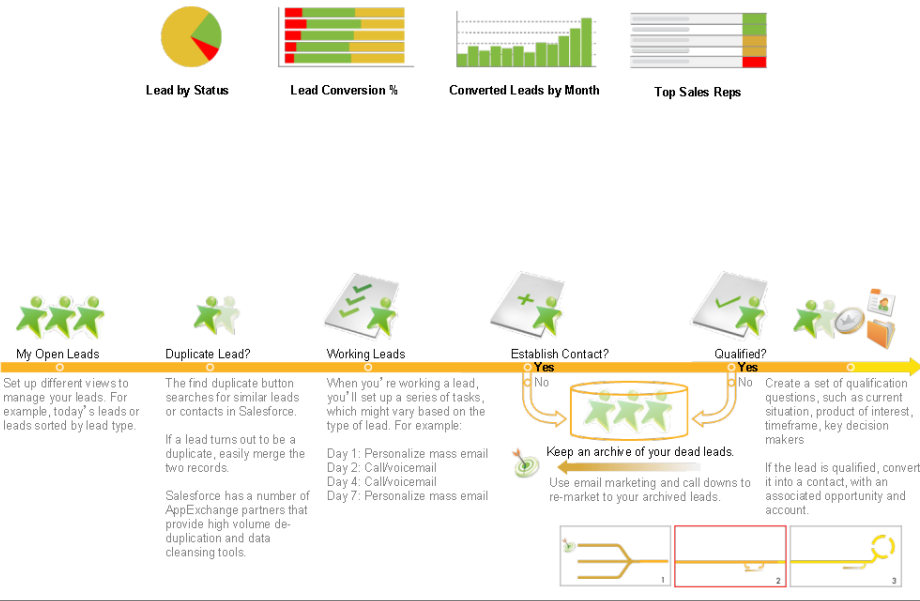
## Generate More Leads

Plan and execute marketing campaigns that generate demand for your product or service. Capture those leads through a variety of channels including your Web site.



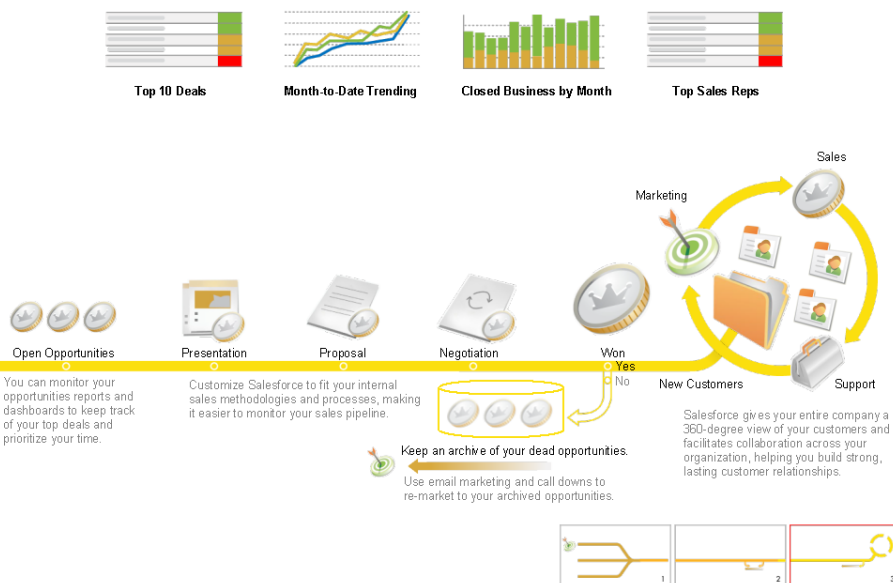
## Optimize Lead Flow

Create a closed-loop follow-up process so leads don't slip through the cracks.  
Establish a lead qualification process to make sure all sales reps use the same consistent methodology.



## Close More Deals

Close deals faster by providing a single place for updating deal information, tracking opportunity milestones, and recording interactions. Easily analyze your sales pipeline so you can quickly identify and eliminate any bottlenecks in the sales cycle.





## Sales and Marketing: Tools and Terminology

Below you'll find the tools and terminology used in the application and online training. For more information visit [successforce.com](https://successforce.com), the Salesforce.com Online User Community. You can search the site, browse around, and see what the community is interested in.



Campaigns

A campaign is an outbound marketing project that you want to plan, manage, and track within Salesforce. It can be a direct mail program, seminar, print advertisement, email, or other type of marketing initiative.



Accounts

Accounts are your organization's customers, competitors, and partners. Each account stores information such as name, address, and phone numbers. For each account, you can store related information such as opportunities, activities, cases, partners, contracts, and notes.



Google AdWords

Google AdWords™ is an online advertising service used to create advertisements that display on major search engines, including Google. Many Salesforce customers advertise online with Google AdWords as a mechanism to generate leads.



Contacts

Contacts are all of the individuals associated with your business accounts that you need to track in Salesforce. You can store various information for a contact, such as phone numbers, addresses, titles, and roles in a deal.



Web-to-Lead Form

With Web-to-Lead, you can gather information from your company's website and automatically generate leads. Web-to-Lead form can be used for contact me requests, registration pages, or campaign landing pages.



Opportunities

Opportunities are the sales and pending deals that you want to track. By adding opportunities, you are also building your "pipeline," which will contribute to your forecast. You can also link opportunities to campaigns to help measure the ROI of your marketing programs.



Leads

A lead is a prospect or potential opportunity - a person you met at a conference who expressed interest, or someone who filled out a form on your company's website.



Products

Products are the individual items that you sell on your opportunities. You can create a product and associate it with a price in a price book. Each product can exist in many different price books with many different prices. A product that is listed in a price book with an associated price is called a price book entry.

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Forecasts

A forecast is your best estimate of how much revenue you can generate in a quarter. This amount is divided between Commit Amount - the amount you can confidently close - and Best Case Amount - the total amount of revenue you might possibly generate. A manager's forecast should include the amount of revenue the entire team can generate together.



Task

Tasks are to-do items that need to be followed up on. They can be associated with accounts, contacts, leads, or other custom objects. You can follow up on the task yourself, or assign it to another user.



Contracts

A contract is a written agreement between two or more parties. Many companies use contracts to define the terms for doing business with other companies. Track the contract through your organization's approval process and use workflow alerts to notify yourself when to initiate contract renewals.



Activities

Maintain a historical record of all activities related to an account, contact, or opportunity. Your activity history includes emails, call notes, and calendar events, so everyone is on the same page.



Documents

A document library is a place to store files without attaching them to accounts, contacts, opportunities, or other records. Each document in the document library resides in a folder. The folder's attributes determine the accessibility of the folder and the documents within it.



Reports

Reports are lists, summaries, and analyses of your data, which you can display or print. To help you monitor your organization, Salesforce offers a wide range of standard reports, accessible in the Reports tab. You can also create new custom reports to access exactly the information you need. You can subtotal and limit your data to help you analyze trends and get a concise picture of what is happening in your organization.



Calendar Events

Group calendaring will help you better collaborate as a team, and arrange meetings with prospects and customers.



Dashboards

Dashboards give you a real-time snapshot of corporate metrics and key performance indicators. A dashboard is a group of different charts (or components) that graphically display your custom report data. You can select up to 20 different custom reports to display data graphically as charts in each dashboard.

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Search

Make searching data and interacting with the results of your searches simple, smooth, and highly effective. Inline paging and sorting features simplify the task of working with large sets of search results. Powerful filtering and scoping functions narrow searches and results. Customization options enable users to design search results layouts that are tailored for the way they work.



Connect Outlook

Outlook users enjoy high levels of productivity with Apex Connect Outlook—formerly called Outlook Edition—which makes it easy to synchronize important customer data between two commonly used applications. With Connect Outlook 3.0 in Spring '07, productivity for Outlook users gets another boost with several enhancements. Users can add emails with attachments, create contacts and leads directly in Outlook, and create relationships between calendar events and associated objects such as accounts and opportunities.



Web-to-Lead Form

You can set up a Web-to-Lead form to capture contact me requests from your company's website. With a lead dedupe solution you can automatically route those requests to the person who owns the account.



CTI Integration

With computer-telephony integration (CTI) capabilities, you can directly integrate your telephone network into Salesforce and access it entirely through the familiar, browser-based Salesforce interface. With the combined power of CTI and the new Salesforce Console, salesforce.com delivers unlimited productivity to your call centers.



Email Templates

With Salesforce you can create email templates for common emails such as web-to-lead responses, sales prospecting, announcements, and internal workflow. You can even personalize parts of the email with information from the contact or account record.



Mass Email

Plan and execute email campaigns targeted at prospects and customers. Enterprise Edition customers can send 500 emails per mass mailing, while Unlimited Edition customers can send 1,000 emails per mass mailing. Salesforce can also integrate with third-party marketing solutions and offers out-of-the-box integration with several top email marketing vendors.



Email Tracking

Evaluate the success of email campaigns with integrated response tracking and easy monitoring of key campaign metrics, such as whether recipients open the messages, when they open them, and more.

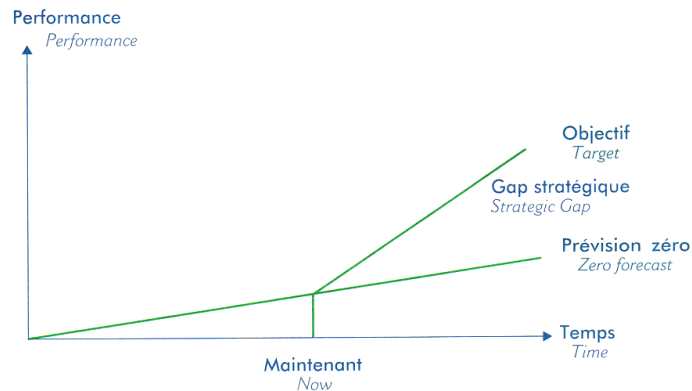


Import Wizard

The ability to easily import data into Salesforce is one of the application's key benefits. Import excel worksheets or CSV (comma separated value) files. Map the information to leads, contacts, accounts, solutions, and custom objects. Search Import Tools on Successforce.com for more information.

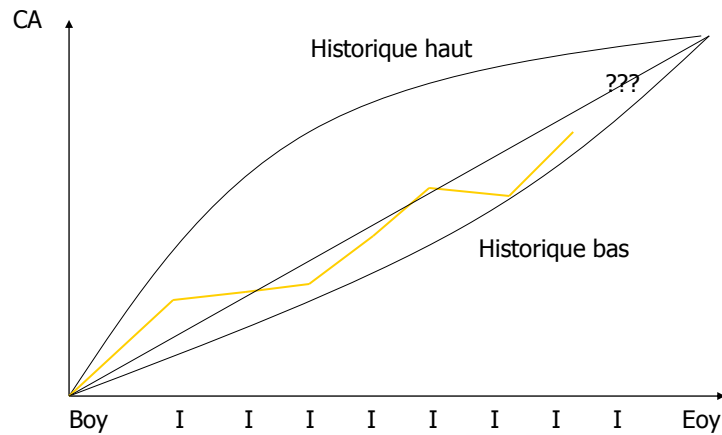


## Analyse du "gap"...

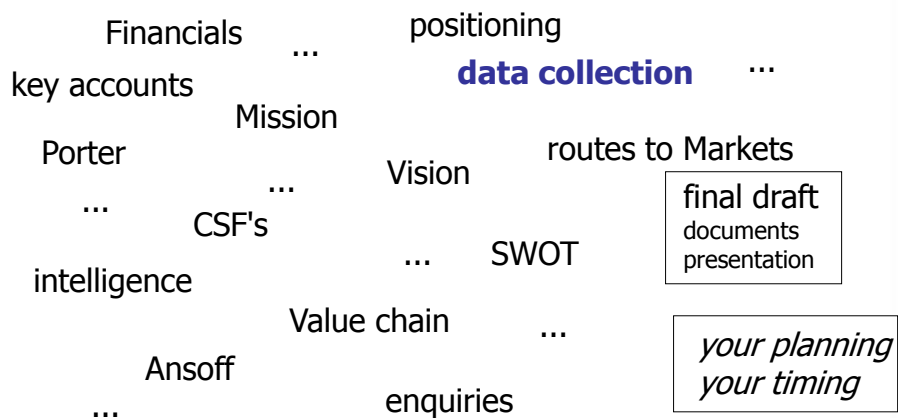




## "Banana"...



## Define your team methodology...





## Some deliverables from your strategic marketing plan

- Can you list your key target markets? (in order of priority)
- Can you describe (quantitatively and qualitatively) the value that is required by each of your key target markets?
- In each of these key target markets, can you describe how your organisation creates this value?
- Do the relevant senior people in your organisation understand and support the above three points?
- Are all the relevant functions in your company organised in a way that is supportive of delivering the value required by the customer?



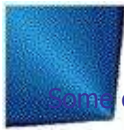
## Some essential deliverables from your strategic marketing plan?

### Market structure and segmentation

- Is there a clear and unambiguous definition of the market we are interested in serving?
- Is it clearly mapped, showing product/service flows, volumes/values in total, our shares and critical conclusions for our organisation?
- Are the segments clearly described and quantified? These must be groups of customers with the same or similar needs, **not** sectors.
- Are the real needs of these segments properly quantified with the relative importance of these needs clearly identified?

### Differentiation

- Is there a clear and quantified analysis of how well our company satisfies these needs compared to competitors?
- Are the opportunities and threats clearly identified by segment?



## Some essential deliverables from a strategic marketing plan

### Scope

- Are all the segments classified according to their relative potential for growth in profits over the next three years and according to our company's relative competitive position in each?
- Are the objectives consistent with their position in the portfolio? (volume, value, market share, profit)
- Are the strategies (including products, services and solutions) consistent with the objectives?
- Are the measurement metrics proposed relevant to the objectives and strategies?
- Are the key issues for action for all departments clearly spelled out as key issues to be addressed?

### Value capture

- Do the objectives and strategies add up to the profit goals required by our company?
- Does the budget follow on logically and clearly from all the above, or is it merely an add on?



## Strategic marketing planning

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>■ What is our purpose?</li> <li>■ What is our Market?</li> <li>■ Who are our customers?</li> <li>■ What are our products?</li> <li>■ What does the customer need?</li> <li>■ How well do our products satisfy these needs?</li> <li>■ What are our objectives?</li> <li>■ How can we allocate our resources optimally?</li> </ul> | <ul style="list-style-type: none"> <li>■ What are our strategies?                             <ul style="list-style-type: none"> <li>■ What new products should be developed?</li> <li>■ How should we price our products?</li> <li>■ What should our channel strategies be?</li> <li>■ What service levels should we provide for our different customer groups?</li> <li>■ How should we communicate with our target markets?</li> </ul> </li> <li>■ How should we measure the effectiveness of our plan?</li> </ul> |
|--|---|

## Strategic marketing planning exercise - SWOT analysis

**1. ENVIRONMENT DESCRIPTION**  
It should be a *specific* part of the business and should be *very important* to the organisation

**2. CRITICAL SUCCESS FACTORS**  
In other words, how do customers choose?

1	
2	
3	
4	
5	

**3. WEIGHTING**  
(How important is each of these CSFs? Score out of 100)

Total 100	

**4. STRENGTHS / WEAKNESSES ANALYSIS**  
How would your customers score you and each of your main competitors out of 10 on each of the CSFs?  
Multiply the score by the weight.

	You	Comp A	Comp B	Comp C	Comp D
1					
2					
3					
4					
5					
*					

**5. OPPORTUNITIES / THREATS**  
What are the few things outside your direct control that have had, and will have, an impact on this part of your business?

**OPPORTUNITIES**

1	
2	
3	
4	
5	

**THREATS**


**6. KEY ISSUES THAT NEED TO BE ADDRESSED**  
What are the really key issues from the SWOT that need to be addressed?


### External audit

- Business and economic environment**
- economic
  - political/fiscal/legal
  - social/cultural
  - technological
  - intra company

### The market

- Total market, size, growth and trends (value/volume) market characteristics, developments and trends**
- products
  - prices
  - physical distribution
  - channels
  - customers/consumers
  - communication
  - industry practices

### Competition

- Major competitors**
- size  
market share/coverage  
market standing/reputation  
production capabilities  
distribution policies  
marketing methods  
extent of diversification  
personal issues  
international links  
profitability

### key strengths and weaknesses

## marketing audit checklist

### Internal audit

marketing operational variable

own company

sales (total, by geographical location, industrial type, customer, by product)  
market shares  
profit margins/costs  
marketing information/research  
marketing mix variables as follows:

- product management
- price
- distribution
- promotion
- operations and resources



## Criteria for a marketing plan

### A. Creative thinking

### B. Clarity

- of thinking
- presentation

### C. Completeness

- Not of details
- of essential elements
  - reiteration of basic strategy
  - basic plan
  - supporting programmes
  - relationships
  - financial impact

### D. Usefulness

- You
- Subordinates
- Peers
- Superiors

### E. Prepareable

- is the product worth the effort

### F. Good process

### G. Objectivity



## TO DO

- Customer view (needs and desires)
- Core competencies
- Mission statement (way to describe precisely your new business...)
- Financial projection (if you can)
- Gap analysis
- Pest or Pestel analysis
- Ansoff (this implies, as for some other frameworks, that you choose correctly your market segmentation, by type of product, by duration, by content, by ...)
- SWOT and CSF's
- Competitive analysis
- Porter framework or Downes and Mui's framework
- Portfolio matrix (BCG like, McKinsey like, your way like, ...)
- Mass customization matrix (dynamic stability)
- Open market
- Vision statement
- Value chain, who does what, routes to market
- Ideas on implementation plan
- Potential projection of sales and profit (if possible)



1- executive abstract

The executive abstract must be a synthesis of all your paper

2- table of contents

3- context

The context must be the description of the "problem" your proposal will try to solve. What is the rational ?

4- objectives

5- methodology / process / planning

You have to describe here

- your whole methodology, starting from initial market analysis, discovery of your "idea", study on the potential and open market, competitive analysis, justification using a lot of mental models and frameworks (porter, bcg, pest, swots, gap analysis, ....), imagination the implementation process (alliances, value chain, ...) and the practical planning at the end.

- Your work group Process, what you decide to do to make this study

- Your work group planning

6- results

Here is the core of your study.

- Your findings from data analysis

- Mission

- Your "creative" idea

- your study on the potential and open market,

- your competitive analysis,

- your justification using a lot of mental models and frameworks

- porter,bcg, pest, swots, gap analysis,

- your imagination of the implementation process

- your study of value chain

- routes to markets

- alliances, value chain, ...

- core competencies aspects

- culture aspects

- Vision

7- recommendations

Your recommendations for implementation, your implementation planning scenario...

8- discussion

This chapter speaks about open subjects to be, at the end, discussed with project team management

- final decision process,

- budgets challenges, ...

- ....

9- references

.. ..

to produce...



## Marketing planning course: detailed tentative agenda

1) Nov, 12th

J.-F.David introductory lecture on Prospective Marketing,  
Teams building, planning

2) Nov 13 -> Nov 19th

Data collection, Mission, market, overview, open market,  
definition of solution, data collection (reports, web, interviews),  
Segmentation, portfolio, SWOT, frameworks (5 forces, ...), ...  
Final idea, integration of data collected, finalization of  
frameworks,

3) Nov 19th

Vision, Marketing objectives, operational marketing  
aspects, economics, ...

4) Nov 19th -> Nov 27th

Additional researches, interviews, data collection

5) Nov 27th

Integration of documents, final version of marketing plan,  
prototype and presentation charts  
Preparation of formal presentation

6) Dec 9th

Exam, Formal presentation of results, rating, discussions



<http://davidjf.free.fr/MkingPlan/main.htm>

[jf@davidjf.com](mailto:jf@davidjf.com)

<http://www.davidjf.com>

<http://freejfd.blogspot.com>