**Lecture No. 15.**

**Marketing planning. Definition. Goals. Stages. Meaning. Development of a marketing plan. Marketing information. Its importance for making management decisions.**

1. Planning of marketing activities.
2. Types of marketing plans.
3. Elements of marketing strategy and development model.
4. Models of marketing strategies.
5. Development of a strategic plan. Structure, plan elements.
6. Strategic marketing planning tools.
7. Tactical marketing planning.

**1.** Planning of marketing activities is an inseparable part of the totality of work processes that helps an organization plan its marketing development and promotion of certain products, brands, and so on. **A marketing plan** is a comprehensive analysis of the enterprise's activities with the subsequent development of marketing activities, which takes into account the financial side of the issue and possible risks.

**Marketing planning** is understood as a logical sequence of individual activities and procedures for setting marketing goals, choosing marketing strategies and developing measures to achieve them over a certain period based on assumptions about the future probable conditions for the implementation of the plan, i.e. It is the activity of developing different types of marketing plan.

A strategic marketing plan is aimed at solving, without detailed elaboration, the strategic objectives of marketing activities in relation to the company as a whole and to individual strategic business units .

**2.** Types of marketing plans.

**1) Depending on the planning time frame:**

- ✓ Long-term (5-10 years)
- ✓ Medium term (2-5 years)
- ✓ Short-term (up to 1 year)

**2) Depending on planning goals:**

- ✓ Strategic;
- ✓ tactical

**3) Depending on the planning scope:**

- ✓ For each structural unit;
- ✓ For each product or product group;
- ✓ One integrated plan;
- ✓ General business plan with a section on marketing.

**4) Depending on the development method** :

- ✓ Top to bottom (plans are developed by management)
- ✓ Bottom-up (divisions of the company themselves set their goals and plans and send them to management);
- ✓ “goals down, plan up” (management forms goals, and plans are developed in departments).

**5) According to the degree of centralization:**

- ✓ Centralized (marketing service);
- ✓ Decentralized (implemented by divisions);
- ✓ Combined

**6) According to the degree of formalization:**

- ✓ Rigid formalization (large companies develop forms, there are regulated planning procedures);
- ✓ Average degree of formalization (there is a formalized planning of a system of criteria and indicators, but they can be modified);
- ✓ Weak formalization (dynamic planning systems of companies operating in different markets);

- ✓ Situational (conducted as new prospects or dangerous situations arise).

Depending on the type of enterprise, the marketing plan may include separate independent plans:

- ✓ Assortment plan;
- ✓ Sales plan;
- ✓ Marketing research plan;
- ✓ Advertising plan;
- ✓ Product distribution plan;
- ✓ Pricing plan;
- ✓ Plan for improving the marketing activities of the enterprise;
- ✓ Procurement plan
- ✓ New Product Development Plan

A strategic marketing plan, typically developed over a period of 3-5 or more years, describes the major factors and forces that are expected to affect the organization over several years, and also contains long-term goals and major marketing strategies, indicating the resources needed for their implementation.

Thus, a strategic marketing plan characterizes the current marketing situation, describes strategies for achieving goals and those activities, the implementation of which leads to their achievement.

**3.** Elements of marketing strategy and development model.

Key elements of a marketing strategy:

1) formulation of general marketing goals - expectations for sales, market share, level of consumer loyalty, level of recognition, brand preference and other indicators;

2) formulation of investment goals for a brand, product, segment, expected results from investing in certain products, brands, market segments

3) competition strategy - determining the company’s line of behavior relative to real and potential competitors based on an assessment of its competitive potential, opportunities to gain and maintain competitive advantages;

4) segmentation strategy – the company's choice of target segments and ways to develop them;

5) the concept of positioning - the idea of presenting a product in the target segment in relation to competitors, including a clear description of the rational and emotional benefits of the target consumer;

6) strategic decisions on the "4Ps" - marketing tools for conveying the chosen positioning concept to target consumers;

7) strategic justification - empirical or theoretical evidence for each element of the strategy (research results, expert assessments of company specialists, conclusions of consulting agencies, etc.).

**4 .** Models of marketing strategies.

1. Planning model - strategic decisions are made through a sequential, planned search for optimal solutions to precisely defined problems. The planning process is highly rational and based on specific data.

2. Interpretation model - when planning, the organization is perceived as a partnership with the same values, beliefs, and feelings. Strategy becomes the result of the dominance of certain values, attitudes, ideas, operating principles, interpersonal interactions and motivational relationships.

3. Political model - strategy is developed as a compromise in conflicts or a search for agreements between interested parties (some defend, for example, the idea of searching for new markets, while others are convinced of the need to revise the company's brand portfolio). Strategy is the result of negotiation and confrontation.

4. Logical increment model - strategy arises from strategic subsystems, each of which is assigned to one of the strategic issues (in this case, the company should be considered as a system in which production, financial, marketing, sales and others can be distinguished).

Strategic goals are based on awareness of needs, and not on analytical planning; such goals can be defined vaguely due to insufficient information.

In a number of companies, the marketing strategy is built as a set of certain tactics that have been tested and proven their worth over time.

5. Ecological model - the strategy is developed based on environmental analysis. According to this model, the organization that survives is the one that better adapts to changes in the external environment.

6. Visionary Leadership Model – Strategy Defined management (for example, the most important decisions, especially during a crisis, can come from the owner or manager of the company himself, who has a good market sense, is able to unite the team, and instill new ways of working).

**5.** Development of a strategic plan. Structure, elements of the plan.

Structure of the strategic plan. The strategic plan of an enterprise is an internal regulatory document in which the requirements of the adopted strategy are implemented in the form of strategic tasks distributed over a specific period of time, and are specified in the form of a set of activities that correspond to these tasks in terms of timing and content.

This approach to strategic planning determines the structure of the strategic plan, which generally includes 7 sections:

I. “Production strategic program” is a list of areas of activity of the enterprise with the assignment of each of them to certain producing production structural units and the allocation of specific products for which production volume indicators are established, distributed over the years of the strategic period.

II. The “Strategic Plan for Scientific and Technical Support” is a program of work for the enterprise to create intellectual products on the basis of which final products are produced. Depending on the degree of novelty of these products, in this section of the strategic plan it is necessary to consider the different composition of activities in the process of scientific and technical preparation of production, which in general includes research (fundamental, exploratory and applied), research, development and experimental technological developments.

III. The “Strategic Organizational Support Plan” is developed in the form of specific measures to reform the organizational structure of the enterprise, necessary to create effective conditions for fulfilling the tasks determined by the adopted strategy. In general, it is necessary to consider such groups of activities as the creation of new structural units of the enterprise, the reorganization of existing structural units and the liquidation of structural units whose activities are excluded during the strategic period.

IV. The “Strategic plan for logistics and product sales” is developed in the form of a set of activities that make up two groups. The first group includes measures for equipping and supporting production, that is, for the acquisition, supply and commissioning of all main types of material resources required for the implementation of the strategic production program. The activities of the second group include work on organizing sales processes - forming a sales system for the complex’s products.

V. “Strategic Personnel Development Plan” is a set of measures to meet the enterprise’s needs for labor resources to solve all strategic tasks. In accordance with the adopted staffing system, priority in the formation of personnel can be given either to the development of one’s own system of training and retraining of personnel, or to a recruitment system (attracting personnel from outside). Since in any case, in practice, these two approaches are combined to one degree or another, this plan must include two corresponding sections (groups of activities).

VI. The “Strategic Plan for the Implementation of Information Technologies” determines the composition and technical and economic characteristics of measures for the formation of an automated control system for an integrated industrial complex. It is advisable to divide these activities into two groups: those that allow solving the problems of the hardware and software of a given system.

VII. The “Strategic Investment Plan” should determine the composition of measures to meet the needs for financial investment resources necessary for the implementation of the strategic plan as a whole. The investment strategic plan must be considered as a comprehensive investment project, the components of which are local investment projects, the object of which is each individual event developed within the framework of all other sections of the strategic plan.

Strategic planning is the process of forming (adjusting) the mission of an organization, its production profile and goals, choosing strategies to identify and obtain the necessary resources and their distribution in order to ensure the effective operation of the organization in the future. The strategic planning process is a tool to assist in decision making. Its task is to ensure innovations and changes in sufficient volume to adequately respond to changes in the external environment of the organization.

The essence of the strategy planning process comes down to finding answers to the questions:

1. What is the current position of the organization, what is the strategic situation in which it finds itself?
2. What position does the organization's management want to see it in in the future?
3. What obstacles may arise on the way to your goal?
4. What and how needs to be done to achieve the goals of the organization's management?

Alternativeity is the most important distinguishing feature of the strategy planning process, associated with the need to make constant strategic choices. The main elements of this choice (plan) are the mission and goals, strategy, strategic objectives, programs, resources and methods of their distribution.

Elements of strategic choice (plan):

Mission and goals. At the top of the hierarchical pyramid of the plan is the mission (general goal) of the organization. The overall goal details the social status of the organization and creates guidelines for the organization to determine goals and strategies at various levels of management.

At the base of the mission are the main goals that are developed to support the mission and within its framework.

Strategies are created to achieve the organization's mission and goals.

Strategic objectives are associated with problems that arise both in the external sphere of the organization and within it when implementing the strategy chosen by the organization.

Programs are sets of measures aimed at implementing a chosen strategy or strategic objective, balanced in terms of timing, executors and resources. Each program includes various projects or work that solve a common problem.

At the base of the pyramid are the resources necessary to achieve the general and local goals of the organization, implement the strategy and carry out individual programs and projects.

**6.** Strategic marketing planning tools.

Analysis of the marketing capabilities of an enterprise is a necessary prerequisite for making marketing decisions and planning actions for their decisions and planning actions for their implementation in practice. The following methods are used.

1) Situational analysis (analysis of the current situation, the company’s position in the market, microenvironmental factors). This is a kind of “snapshot” of the real activity of the enterprise in its relations with the external environment. The essence of the situational analysis technique lies in the sequence of consideration (in a selected circle) of the elements of the external and internal marketing environment and the assessment of their impact on the marketing capabilities of the enterprise.

The “5x5” method, formulated by A. Meski, involves identifying the most significant elements of the external environment. It includes 5 questions about 5 environmental factors:

1. If you have information about environmental factors, name at least 5 of them. 2. What 5 environmental factors pose the greatest danger to you? 3. What 5

factors do you know from your competitors' plans? 4. If you have already determined the direction of the strategy, what 5 factors would be most important for achieving the goals?

5. Name 5 external spaces that include the possibility of changes that could become favorable for you. 2) STEP (PEST) – analysis (analysis of macroenvironmental factors). It is a technique for analyzing the key elements of the macroenvironment of an enterprise. Such analysis is especially important when planning at the corporate level. At the same time, in conditions of a developed external environment, it is customary to use STEP analysis, while in a developing environment, PEST analysis is used. 3) SWOT analysis (analysis of market opportunities/threats, strengths and weaknesses of the enterprise). This is a detailed analysis of the marketing capabilities of an enterprise for which assessments are applied:

- strengths (Strengths) and weaknesses (Weaknesses) of the enterprise (advantages and disadvantages). This is the presence or absence of appropriate resources, skills, competencies that influence the functioning of the enterprise in a competitive environment;
- opportunities (Opportunities) and threats (Threats) of the market. These are external events, trends and processes that promote or hinder the development of competitive advantages of an enterprise.

When conducting a SWOT analysis, various methodological procedures can be used, including:

- situational analysis using desk and field research;
- development of analytical maps based on expert assessments (“brainstorming”);
- comparison matrices;
- building profiles of the strengths and weaknesses of the enterprise in comparison with competitors;
- positioning through focus groups, surveys, etc.

The classic approach to assessing the opportunities and threats of the market is the method proposed by I. Ansoff for the enterprise’s perception of strong and weak signals coming from the external environment. Strong signals are events that have unexpected sources and quickly affect the economic indicators of the enterprise's development. Weak signals are early and imprecise signs of the occurrence of important events that may be of great importance for the enterprise in the future. In the Russian market in the 90s, strong signals for enterprises were the processes of a sharp decline in the solvency of consumers, price changes, inflation, etc. Weak signals were associated with increased competition from foreign firms, an increase in the number of unemployed, unprepared market infrastructure, etc.

5) Key success factors (KFU/ KSF ) - indicators that are most important for a given industry, those points of effort, focusing on which allows you to achieve the best results:

- actions to position the company;
- assortment of the enterprise corresponding to target customers
- competent pricing policy
- advertising
- location of the company

KSF methodology is as follows:

- from the standard list of KSF, those that correspond to our industry and our strategic group are selected (directly competing enterprises, similar in profile, size, territory, segment);
- assessment of the company's potential according to KSF .

6) The table of market attractiveness factors allows you to compare different markets and make decisions about entering a particular market.

Market attractiveness factors:

- market capacity and opportunities

- rate of return
- price level
- state of competition
- barriers to market entry
- social significance
- correct restrictions, etc.

The importance of the factor and its strength of action are assessed. Ansoff proposed to evaluate the attractiveness of the market using the following formula:

Market attractiveness = growth prospect * profitability prospect * stability prospect

The growth prospect is assessed using a demand forecast. The prospect of profitability is calculated based on the rate of return expertly, taking into account possible fluctuations in prices, demand, government regulation, and the aggressiveness of competitors. The prospect of stability is determined on the basis of important trends and events, their impact on **the structural economic unit.**

7) Portfolio analysis is based on the analysis of the curve of the BCG and GE matrices and the experience curve. A structural economic unit is a relatively independent area of activity of an enterprise, distinguished on the basis of product, market or technology. For each structural economic unit, it is advisable to identify the stage of the product life cycle at which it is located.

8) Experience (learning) curve - shows that with an increase in accumulated production volume and experience, resource costs per unit of production decrease:

8) GAP analysis (eng. Gap - “gap”) (analysis of the “gap” strategic gap between the real opportunities and aspirations of the enterprise). What is desired in the activities of an enterprise is determined by the vision of what it wants to achieve in its development. Allows you to set the desired “bar height” of strategic claims. Real is what a business can actually achieve by keeping its current policies unchanged. Thus, GAP analysis can be called an “organized attack on the gap” between the desired and actual reality of the enterprise.

To reduce the strategic gap, a search for new opportunities for external growth is required: the release of new products, the development of new markets, integration, diversification, specialization (movement along the production chain). It is further necessary to rank growth opportunities in order of priority and determine how they will contribute financially to achieving the desired results. Ensuring internal growth is possible through investment, cost reduction, increasing production scale, improving the management structure, etc.

**7.** Tactical Marketing Planning

**A tactical marketing plan** is a detailed outline and costing of specific promotions needed to achieve the goals set for the first year in the strategic marketing plan. The tactical plan is usually drawn up for one year.

The problem with this approach is that many managers sell products and services that they consider easy to sell to consumers who offer the least resistance. By first developing short-term tactical marketing plans and second by extrapolating from them, managers simply succeed in extrapolating from their own shortcomings. Preparing a detailed marketing plan is typical for companies that confuse sales forecasts and budgeting with strategic marketing planning.

Tactical planning is making decisions about how an organization's resources should be allocated to achieve strategic goals.

Features of tactical planning:

- the implementation of tactical decisions is better observed and less at risk, since such decisions relate mainly to internal problems;

- the results of tactical decisions are easier to evaluate, since they can be expressed in specific digital indicators (for example, it is more difficult for a farmer to assess the specific benefits of introducing products under his own brand than to calculate the increase in the production of poultry meat in special packaging when acquiring new capacities);

- for tactical planning, in addition to its concentration on the middle and lower levels of management, it is also typical to gravitate towards the levels of individual divisions - product, regional, functional.

Operational planning means almost the same thing as tactical planning. The term “operational”, more clearly than the term “tactical”, emphasizes that this is the planning of individual operations in the general economic flow in the short and medium periods, for example, production planning, marketing planning, etc. Operational planning also refers to the preparation of an organization's budget.

The planning process is the first stage of the overall activity of the company and includes the following main points:

1. The process of drawing up plans, or the direct process of planning, i.e. making decisions about the future goals of the organization and how to achieve them. The result of the planning process is a system of plans.

2. Activities to implement planned decisions. The results of this activity are the real performance indicators of the organization.

3. Monitoring the results. At this stage, real results are compared with planned indicators, and ways to adjust the organization’s actions in the right direction are determined. Despite the fact that control is the last stage of planning activities, its importance is very great, since control determines the effectiveness of the planning process in the organization.

The planning process consists of a number of stages following each other.

**First stage.** The company conducts research on its external and internal environment, determines the main components of the organizational environment, identifies those that really matter to it, collects and tracks information about these components, makes forecasts of the future state of the environment, and assesses the real position of the company.

**Second phase.** The company establishes the desired directions and guidelines for its activities (vision, mission, set of goals). Sometimes the goal setting stage precedes the environmental analysis.

**Third stage.** Strategic analysis. The company compares goals (desired indicators) and the results of studies of external and internal environmental factors (limiting the achievement of desired indicators) and determines the gap between them. Using strategic analysis methods, various strategy options are formed.

**Fourth stage** . One of the alternative strategies is selected and developed.

**Fifth stage** . The final strategic plan for the company is being prepared.

**Sixth stage** . Medium-term planning. Medium-term plans and programs are being prepared.

**Seventh stage.** Based on the strategic plan and the results of medium-term planning, the company develops annual plans and projects.

**The eighth and ninth stages,** while not stages of the direct planning process, determine the prerequisites for the creation of new plans.

The sustainability of the functioning of an enterprise, firm, company in market conditions is determined, among other things, by the presence of actions to coordinate the external manifestation of their elements. At the same time, ensuring compliance between the goals, objectives and potential capabilities of the enterprise is the basis for justifying the directions of activity. These activities are combined within the framework of strategic planning, which, in combination with marketing, provides the opportunity for the organization to grow in terms of economic performance.

Planning is the ability to foresee the goals of a company (organization), predict the results of its activities and evaluate the resources necessary to achieve certain goals.