

POST PLAN IMPROVISATIONS OF STRATEGIC MARKETING PLANS:
TOWARDS A TAXONOMY

by

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Title: POST PLAN IMPROVISATIONS OF STRATEGIC MARKETING PLANS:

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Marketing Planning is the most prescribed tool for “doing” marketing. The marketing plan’s implementation schedule provides a roadmap for accomplishing a firm’s stated marketing objectives. For over three decades researchers have investigated planning’s link to firm performance. The consensus has been that they do improve performance although there is little empirical evidence to suggest how implementation of those plans is related.

Environmental turbulence, new information and failed implementation cause firms to act outside of the planning framework. Improvisation is the contemporaneous creation and execution of an action. The extent to which firms act improvisationally has been studied, but to date there has been no empirical investigation that exposes the different types of post plan improvisations of strategic marketing plans that exist.

This dissertation attempts to identify the different types of post plan improvisations (PPI) used in marketing. Using the Critical Incident Technique, 384 incidents of PPI were gathered from marketing planners and then used to create categories and systematically classify each incident. Four primary categories of causes of deviations, six categories of deviations and four categories of outcomes emerged from the data.

The results provide a foundation for a theoretical model of the types of post plan improvisations in practice. This will allow further research into contextual differences that could help managers decide when to improvise and when to follow their plan. Further, by exposing the useful application of the CIT method in a new field, additional researchers might begin to use the technique to update and more deeply understand other marketing phenomenon.

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CHAPTER I

INTRODUCTION

“Little is known about what constitutes effective marketing management in practice or whether practice is consistent with what little is known from theory” (Bonoma 1985, p. 203). Bonoma’s statement is still true today, twenty-three years later.

Marketing is not hard to understand, however, I would argue that it is very hard to do well.

In classrooms and in practice the most prescribed tool for “doing” marketing involves the creation of a marketing plan. The fruit of a plan is its implementation schedule. Rooted in analytics and strategy, an implementation schedule lays out the organizational activities and responsibilities onto a timeline for achieving one’s marketing objectives. Yet, these implementation schedules are based on incomplete market knowledge and are inevitably full of predictive errors (Weber 2001).

This dissertation explores a practical facet of marketing plan implementation. In most cases, if not all, plans are not completely accurate or completely inclusive which results in some deviation from that plan (Grant 2003). The closest theoretical conversation about acting outside of the planning process is improvisation. Improvisation is the contemporaneous composition and execution of an action (Pina e

Cunha et al.1999). The marketing planning and improvisation literature are both reviewed to better understand how marketing management is “done” inside and outside of the planning process.

Improvisation has been offered as an alternative to the rigidity problems sometimes associated with separate planning and implementation periods. Although improvisation has been linked to many different disciplines, its artistic origins are most often described in the academic literature. Theatre groups and jazz bands serve as a metaphor for business organizations. In contrast to planning, artists use their collective dedication to innovation and a lack of predetermined structure to build something completely unscripted, or unplanned.

Thought provoking as these analogies might be, they have led to relatively little empirical research about organizational improvisation. The few empirical marketing studies that do exist (Moorman and Miner1998; Slotegraaf and Dickson 2004; Vera & Crossan 2005) have studied improvisation as one generalized measure. This assumes that all types of improvisational acts are similar. While this might be true, to date there has not been an effort to detail the types of improvisations that exist that could support such an assumption. This dissertation includes a study that will attempt to create a taxonomy of post plan improvisations. Post plan improvisations (PPI) are defined as, “the extent to which firms alter their actions from those specified in their approved marketing plan” (Slotegraaf and Dickson 2004, p. 374).

The Critical Incident Technique (CIT) will be used to research the types of post plan improvisations that exist. This inductive research method allows each respondent to

identify and then describe an incident of PPI through an online questionnaire. A critical incident of PPI includes three units of observation; a cause, a deviation from plan and an outcome. The primary researcher and a second judge will independently sort each response and create mutually exclusive and exhaustive categories for each unit of observation. Then, a group of additional independent judges will systematically classify the responses.

By using the critical incident technique to create a taxonomy of post plan improvisations this study will make theoretical, methodological and managerial contributions. First, the theoretical contribution will include a description of the extant types of improvisations described by marketing managers. By inductively augmenting the existing literature, additional theoretical work can begin to sort through which types of post plan improvisations relate to existing theories and begin to formulate deductive hypotheses for future testing. Secondly, this study will make a methodological contribution by using the CIT in a new context. Before now, the CIT method has been used almost exclusively in service research (Gremler 2004). This is partly because the CIT method requires a large number of respondents typically too evasive for most qualitative work in industrial marketing because researchers rarely have access to hundreds of marketing managers. By utilizing the internet for data collection, the methodology of CIT will gain exposure among another group of researchers that may be unfamiliar with the technique. The third and final contribution is managerial. This research begins to address the issue of contextual benefits of post plan improvisation. In order to provide managers with assistance in deciding when to improvise and when not

to, a complete list and understanding of the types of improvisations is necessary. Once the contextual information is available, specific subgroups can begin to test for relative benefits.

This dissertation is comprised of five chapters and an appendix. In this first chapter, the purpose of this dissertation and direction for the rest of the dissertation are provided. The second chapter of this dissertation reviews the literature. Marketing planning and improvisation are each discussed individually and then collectively. Research gaps emerge that warrant further research. The third chapter addresses the design of an empirical study of PPI using the CIT method. Further justification and explanation of the CIT method is provided. The fourth chapter presents the results of the study. The categories that inductively emerged during the study are presented as well as frequency statistics and a crosstab analysis looking at significant relationships among major units of observations. Finally, the fifth chapter discusses the key findings and subsequent insights as they relate to the extant literature. Detailed explanations are provided for the resulting contributions to theory and practice.

CHAPTER II

LITERATURE REVIEW

“...plans are useless, but planning is indispensable.”

- Dwight D. Eisenhower

Eisenhower’s quote captures a long-standing conundrum; organizations that engage in the planning process are linked to better performance even though the plans that were created, often times, were never fully implemented. Planning seems to improve performance (Smith 2005), however after the plan has been created, the environment changes in ways not completely expected. How do firms decipher when to consult the plan and when to waiver? In order to better understand this, two separate literatures are reviewed - marketing planning and improvisation. Each of these reviews provide discussions of each general topic and details about the most pertinent extant literature. Research opportunities are illuminated that lead to this dissertation’s primary research question; what are the different types of post plan improvisations of strategic marketing plans?

Marketing Planning

The first section of this chapter reviews the marketing planning literature.

Reviewing marketing planning requires looking at the entire phenomenon and related literature as well as planning's specific components and the research dedicated to their individual understanding. This portion of the literature review begins by addressing the entire phenomenon. A recent review of the holistic marketing planning literature (Smith 2005) is summarized and then augmented with additional discussions, both supporting and questioning the causal effects of marketing planning. The holistic review on the marketing planning process reveals an important gap. Planning and performance links do not capture the management effects occurring between the time the plan is created and when performance is measured.

Following the review of literature dedicated to the holistic view of marketing planning, each of marketing planning's objectives (situational analysis, competitive advantages, marketing management and learning) and their individual managerial components (marketing research, strategy development, implementation schedules and controls) are more closely reviewed. The review of planning's individual components also reveals an important gap. Marketing planning's components are adequately researched. However, plan management and efforts to keep the process dynamic warrant additional attention.

Holistic Review of Marketing Planning

Marketing planning, “is the logical sequence of activities which leads to the setting of marketing objectives and the formulation of plans to achieve them” (McDonald 1989, p. 2). Smith (2005) reviews the literature on marketing planning and notes a predictable pattern of phenomenon assertion (i.e. marketing planning improves performance), counter assertion (i.e. we cannot prove that marketing planning improves performance) and then a slightly qualified consensus (i.e. marketing planning improves performance in most cases).

The first era of marketing planning research asserts the phenomenon of planning. Thune and House (1970) survey ninety-two large firms of varying industries and capture five measures of financial performance. Their results show that increased formal planning processes lead to greater increases in performance than do informal planning processes. Herold (1972) investigated five pairs of rival firms for performance/planning relationships. Over a seven-year period, the formal planners extend their lead over informal planners. These early studies are bolstered by the inclusion of attitudes towards planning by top decision makers. Eastlack and McDonald (1970) survey two hundred and eleven CEOs and found that firms whose CEOs valued formal planning outgrew firms whose CEOs did not.

The second era of marketing planning research countered the planning assertion. The empirical support of the first generation of strategic planning research led to

questions of applicability. Armstrong (1982) reviewed fifteen studies and found that ten supported formal planning's positive influence on financial performance, three supported informal planning and two showed no difference. The mixed reviews were indicative of the research to come. The counter assertion phase of research questioned the universal benefits of the previous era's findings. Individual studies used a contingency approach to investigate when and where strategic planning worked best. Bracker and Pearson (1985) found that, although slight, small firms that employed formal planning techniques outperformed those that did not. Rue and Fulmer (1973) posited that manufacturing firms were better served by planning than service firms. Ryhne (1986) included temporal orientations and competitive foci. They found that long-term orientations and externally focused firms were more apt to benefit from the planning processes. The second era of research, counter assertion, extended the research in two important ways. First, the performance construct is difficult to ascertain. Sales and profits are not a consistent measure of firm performance, and other measures must be considered. Secondly, the planning performance link was shown to be highly dependent on contextual factors, and the earliest work did not employ methodologies rigorous enough to handle such complexity.

The third era of marketing planning research attempted to improve measures of firm performance and methodological rigor. Cameron (1986) reviewed financial measures for their relativity to organizational effectiveness and found that they were not sufficient. He pointed out that there are inherent conflicts of disagreement over success measures that diminish the likelihood of consensus among researchers. Venkatraman and

Ramanujam (1986) acknowledge that some forms of performance are necessary for strategic research yet the many different types of data and contexts require more thorough and multifaceted research techniques.

Taking advantage of improved methodologies and statistical tools, the third era took on the complexity of context as well. Lysonski and Pecotich (1992) surveyed five hundred and twenty two firms in a single study. They investigated the relationships between formal planning, comprehensiveness, environmental stability and financial performance. They concluded that strategic marketing planning improves financial performance and that planning is independent of environmental stability. Two meta analyses (Schwenk and Shrader 1993; Miller and Cardinal 1994) reviewed previous studies in light of greater methodological scrutiny and continued to find support that planning increases performance. Finally, Priem et al. (1995) cap the debate by concluding that the more sophisticated methodologies have actually worked to strengthen the ties between planning and performance.

The planning/ performance link has been well established throughout marketing and management literature (Herold 1972; Wood and LaForge 1979; Claycomb et al. 2000). Thune and House (1970) demonstrated that not only did formal planners outperform non-planners, but they also showed that the same firms improved their own performance after formal planning was adopted. Meta-analyses reviewed the initial wave of research, and again, reported a positive and significant benefit due to planning (Schwenk and Shrader 1993). Brews and Hunt (1999) noted that advanced methodologies have produced stronger planning/performance relationships and have

silenced many of the critics who insisted there might only be a correlative, rather than a causal, relationship between planning and performance.

Often, the literature appears to treat marketing planning as a ubiquitous solution for all businesses. McDonald observes that, “academics have, in general, been guilty of a gross over-simplification of a subject which has an infinite number of contextual ramifications” (1996, p. 11). Although there is a slight distinction between formality (written or unwritten) and sophistication of plans (Rue and Ibrahim 1998), very few distinctions between types of marketing plans exist. Dennis and Macaulay (2003) note that too many models of strategic marketing planning prescribe a rigid, formal process with very little flexibility for implementation. Piercy and Morgan (1990) were among the first to criticize formal planning procedures and advocate the creation of a more complete view of the entire process. Their work directly led to Greenley and Bayus’s (1994) attempt at classifying different marketing planning processes.

A counter explanation to the direction of the planning and performance relationship exists. There is evidence to suggest that performance requires and leads to planning and not the other way around (Smith 2005). It has been suggested that firms reach a critical mass of performance that necessitates planning (Greiner 1972). This brings up an interesting void in the understanding of how marketing practice and planning should be prescribed to new or very young firms. It seems that business planning is important before launch and at a certain point of successful maturity, but what form of planning or marketing practice should be utilized between these two milestones? What then are new and young firms supposed to do in place of traditional marketing

planning until they emerge as a viable entity, complicated and large enough to take advantage of the multitude of business processes designed for firms of a certain critical mass?

There is a smattering of exceptions to the redundant praise of planning processes. Honig and Karlsson (2004) do not find evidence that planning among nascent organizations is positively linked to increased profitability. Instead, they relate the incorporation of planning to institutional forces of governments, industries and education. Stotegraaf and Dickson (2004) describe the paradox of marketing planning capabilities. Firms with stronger planning capabilities have a negative correlation with post plan improvisation and the corresponding implementation rigidity is linked to lower performance. Noting that current models of marketing planning are too structurally rigid, Dennis and Macaulay (2003) introduce the improvisational techniques of jazz musicians as an alternative framework in support of more flexible planning technologies. Finally, Weber (2001) points to the lack of marketing research capabilities within most firms as another danger to investing in marketing planning and the direction it might provide.

Still, the consensus is overwhelmingly in favor that planning improves performance. Given the lopsided theoretical support, there are surprisingly few companies engaged in marketing planning (McDonald 1996). Why are firms not planning? Leppard and McDonald (1991) identify five barriers to marketing planning. The first barrier is cognitive. Firms of all sizes and industry lack the marketing skills and knowledge to incorporate marketing planning into their firm's management. The second barrier is information. Although data generation is hardly a problem in today's

environment, measuring marketing's impact (i.e. capturing and distilling the right information) remains one of the field's most pressing issues. Thirdly, resources are scarce. Allocation of personnel and funds towards long-term strategic objectives is difficult, especially under the current pressures of financial scrutiny and rapid technological disruption. The fourth barrier is cultural. Planning and marketing must be supported throughout an organization in order to capture its value. However, planning is tedious and demanding work not suited for all types of employees. The final barrier is behavioral. People act inappropriately and fail to disclose valuable information because of personal interests or fears, which hinder the necessary cooperation and integration needed for successful planning.

The holistic review of marketing planning reveals an important gap. The earliest research was conducted during a period when marketing planning and implementation were considered separate, sequential activities. To compound the problem, later research often used these studies as part of meta-analyses on planning and performance. Therefore, current assumptions about planning and performance links might not capture the management effects that occur between the time the plan is created and the time the performance measures are taken. This suggests that the implementation process needs closer investigation.

Review of Marketing Planning's Individual Objectives and Components

Although marketing plans and the process for generating those plans differs in degrees of formality and sophistication, the objectives are generally the same (Dibb 2002; McDonald 1989) and include:

1. Situational Analysis - Using marketing research to evaluate the internal and external environment in order to set objectives congruent with long term goals of the organization
2. Strategy Development - Exploiting competitive advantages and minimizing threats
3. Marketing Management - Creating an implementation schedule to determine budgets, provide a roadmap for carrying out the marketing strategy and communicate the marketing intentions throughout the organization
4. Learning - Increasing knowledge through control mechanisms designed to identify, capture and disseminate useful information.

The planning literature understates the complexity of planning and implementation. It suggests that there is a single, one size fits all solution for developing and implementing strategic plans. Looking at firms in the aggregate, as theory often dictates, prevents unique construction and understanding of marketing planning characteristics that more closely match the needs of organizations through different life

cycles (Greiner 1972). Accordingly, this section will attempt to incorporate the explicit variations investigated or discussed in previous research and outline the types of marketing planning components associated with each of its objectives.

Situational Analysis

The first objective of marketing planning is the creation of a situational analysis. This process includes an assessment of the internal and external environment. Internally, the company's resources and liabilities must be ascertained and generally include personnel, products and finances. Externally, the competition, market conditions and consumer interests are reviewed.

The component of marketing practice that serves this objective is marketing research. Marketing research is the "systematic design, collection, analysis and reporting of data relevant to a specific marketing situation facing an organization (Armstrong & Kotler 2006, pg. 102)." In its most primitive form, marketing research is conducted through the experiences of the marketer and stored in memory. Although research shows that there are numerous psychological short-comings that should dissuade managers from solely relying on experiential information (Weber 2001) there is no doubt that it remains a prominent method among organizations.

Greenley and Bayus (1994) empirically investigated the marketing planning processes and discovered four types of decision making planners. (Their use of the term "marketing planning process" is not as inclusive as this paper's. They defined marketing planning process as, "the techniques available to interpret knowledge about the

environment and to aid in decision making” (p. 142). Their work more closely aligns with this paper’s conceptualization of the situational analysis objective and market research component.)

Greenley and Bayus (1994) used Piercy and Morgan’s (1990) conceptual model to describe four different types of planning organizations as depicted in Figure 1.1. They based their study on multidimensional interpretations (analytical, organizational and behavioral) of information gathering and analysis for decision making (i.e. SWOT analysis, perceptual mapping, etc.). They investigated US and UK companies and discovered that the smallest percentage (13%) fell into their sophisticated category. These firms used both qualitative and quantitative research tools and thoroughly analyzed the data. They found a fairly large portion of companies (30%) that fell into the information seeker category. These firms were aggressively using both types of research techniques to capture data but failed to completely analyze it. The largest group of companies (36%) fell into the unsophisticated decision maker’s category. This group of companies capture internal data but do not adequately utilize analytic techniques consistent with the formal marketing planning process. The final group, gut-feelers (21%), operate with less data and utilize very few marketing analytic techniques. In these companies, senior managers are involved but either unaware of formal planning or unwilling to implement its systems.

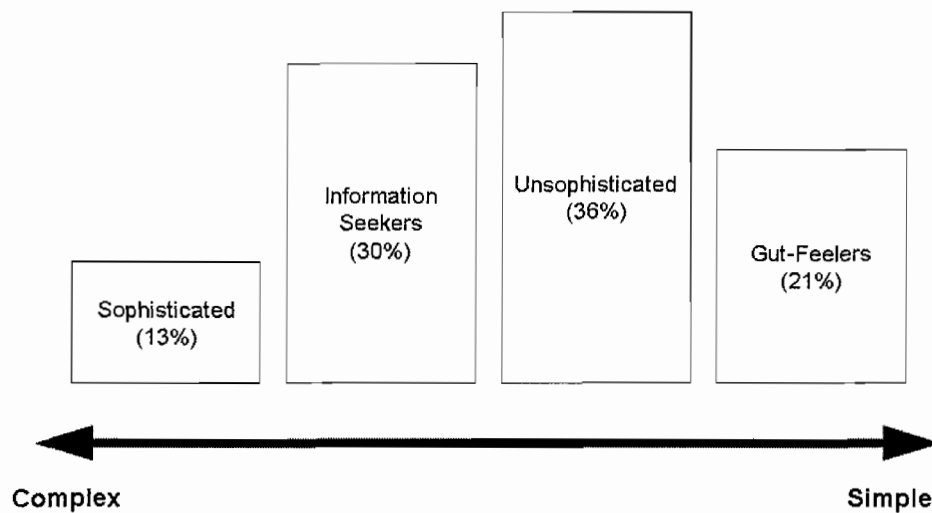


Figure 2.1. Four Different Types of Marketing Planning Processes (Greenley and Bayus, 1994)

Strategy Development

The second objective of marketing planning is strategy development. A strategy is a long-term plan of action designed to achieve a goal. Developing a competitive advantage should be a top priority of marketing planners (McDonald, 1989). The effectiveness of developing a strategy is partly contingent on successfully completing and utilizing marketing research and is therefore sequentially dependent on the situational analysis.

Gelderen et al. (2000) demarcate strategies from traditional connotations associated in the strategic management literature and propose five types of strategies with relationships to performance. First, Reactive Strategy is completely based on environmental forces and is void of planning. Second, Opportunistic Strategy starts with

a plan but quickly sheds the structure when opportunities become available. Third, Critical Point Strategy identifies the single most important objective and focuses on its achievement with no consideration for other interests or objectives. Fourth, Complete Planning Strategy provides detailed plans for all expected activities and supports a rigid implementation of those plans. Finally, a fifth strategy emerged from their exploratory research, Habit Strategy. The habit category employs a standardized approach, or routines, based on previous experiences.

Marketing Management

The third objective of marketing planning is marketing management.

Understanding the environment through marketing research and developing competitive advantages through strategy formulation are useless without successful implementation. Although there is not a single definition of implementation, Kotler (1997) defines marketing implementation as the process that turns plan into action. The implementation schedule is the component of marketing planning that serves the purpose of organizing the marketing management function. Implementation schedules include a calendar of programs that map financial requirements and role responsibilities.

Noble and Mokwa (1999) call for additional focus on implementation processes. They note the small sum of dedicated research and said, “with few exceptions, research has considered marketing strategy processes broadly, with only tangential reference to the implementation stage” (p. 58). A grounded theory study resulted in a model of the significant forces involved in marketing plan implementation. They tested the model

with many managers inside of two large companies and found that there was a significant relationship between role performance (comprised of strategy commitment and role commitment) and employee buy-in on implementation success. Their study provides a theoretical foundation for the important subject of implementation. However, they also point to the need for future research regarding managerial insights and other theory generation efforts.

The complexity of marketing implementation situations make it difficult to empirically assess. Vorhies and Morgan (2003) use configuration theory to describe the need for different implementation approaches for firms of differing strategic types. They surveyed marketing executives in the transportation industry and found a link between the marketing organization fit within its business strategy and marketing performance. Their look at implementation makes a significant advancement, but even they conclude that marketing implementation needs a tremendous amount of additional research.

Organizational Learning

The fourth objective of marketing planning is organizational learning and improvement. Organizational learning is, “a process by which organizations as collectives learn through interaction with their environments. The organizational learning process is viewed as a cyclical one in which “individuals” actions lead to organizational interactions with the environment, the environment responds, and environmental responses are interpreted by individuals who learn by updating their beliefs about cause-effect relationships” (Sinkula 1994; p. 35).

Controls are placed into marketing plans to foster learning. The entire marketing planning process supports the learning capabilities of an organization and delivers information designed to bolster the efficacy of the firm. Controls allow for the connection of marketing management to the initial component of marketing research. Without this linkage, marketing planning would not be a process but rather a series of unconnected, linear efforts.

The literature on organizational learning is immense and not easily summarized. Whalen and Starbuck (2008) reviewed learning by organizations. They point to three different forms of organizational attention and interpretation. Researchers have proposed that organizations learn from different modes of interpretation (Daft and Weick, 1984), an absorptive capacity (Cohen and Levinthal, 1990) and an organizational identity (Dutton and Dukerich, 1991).

Two of the most distinct types of learning are single and double loop learning (Argyris, 1976). Single loop learning occurs when errors are detected and corrected in accordance with the plan's objectives. Single loop learning does not question underlying beliefs or assumptions. Double loop learning goes a step farther. Not only does it detect and correct errors, but it also reevaluates the existing norms and procedures that led to the error. Duetero-learning occurs when organizations learn how to carry out both single and double loop learning. Dodgson (1993) points out that learning can occur distinctly in different functions of the organization including marketing. Therefore, strategic marketing planning can encapsulate its own level of organizational learning separate from that of the organization as a whole.

Brews and Hunt (1999) attempted to mitigate a long-standing debate between planning advocates, such as Ansoff (1991) and learning advocates, such as Mintzberg (1994). Managers from 426 firms of differing size and industry responded to surveys regarding their planning, environments and performance. The results showed greater support for the planning performance link but noted that the value of incrementalism and learning should not be completely discounted. Although they did not put the debate to rest entirely, they did link planning and learning together and began to bridge the theoretical silos among some management scholars.

The four components representing the objectives of marketing planning should be cyclical (Smith, 2005). As the planning process comes full circle, the situational analysis is bolstered by information collected through the implementation of the last program schedule and stored in the organizational memory. The next marketing planning process repeats the situational analysis. If properly designed and managed, the information gained through the learning process is available for review. Degrees of formality and sophistication in connecting the planning cycles vary. The integration of planning cycles can be explicitly designed and systematically managed through controls created in the previous plan or it can be informal and left to the experience and memory of individuals.

In theory, the marketing planning process is logical and thorough. One difficulty in planning is in its implementation (Noble and Mokwa 1999). Plans are not exact and rarely, if ever, accurately forecast their intended futures. As Bonoma (1985) said, “marketing for a number of years has been long on advice about what to do in a given competitive or market situation and short on useful recommendations on how to do it

within company, competitor, and customer constraints” (p. 207). Piercy (1998) agrees that implementation does not receive nearly the amount of attention that it deserves relative to strategic formulation. By ignoring the reality that plans are inherently wrong, we leave our theory void of contingency processes. A more thorough understanding of what to do when plans are broken is needed.

Marketing planning’s components have been thoroughly researched. However, this review of planning’s individual components suggests that the implementation of the plan has become an integrated concept paramount to the planning literature. One area of implementation that has not been considered in relation to marketing planning is improvisation. Improvisation could update the planning process for current methods of complex and dynamic systems. The next section of this chapter reviews the literature on improvisation.

Improvisation

To understand how planning improves firm performance, the marketing planning literature must be augmented with an understanding of implementation efforts. Most of the planning literature assumes that a well conceived plan must then still be (at least partially) executed. In the course of that execution, new information, misanalysis, error or reconsideration can cause the need to improvise, or to create and execute in the moment. Dennis and Macaulay (2003) ascertain the importance of improvisation for organizations to deal with environmental turbulence and increasingly complex and

competitive environments. They conclude that planning is the central theme from which improvisation springs. Planning and improvisation are more than not mutually exclusive, they are inherently dependent on each other. The second section of this chapter reviews the improvisation literature.

The review begins with an overview of improvisation. Different definitions from different fields are considered. Time is an important variable in those definitions and issues of temporality are considered. Following the overview, summaries of the exemplary conceptual and empirical work are presented.

The review on improvisation reveals an important gap. The previous empirical studies have aggregated the phenomenon of improvisation and by doing so assume equality among differing types of improvisation. While this might be true, to date there has not been an effort to detail the types of improvisations that exist that could support such an assumption. The concept of post plan improvisation needs more specific research to identify the different types that exist.

Defining Improvisation

Multiple definitions of improvisation have emerged from various fields. Moorman and Miner (1998b) include a table with forty-two different constructs of improvisation generated from communication, management, music, medical, theatrical, education and other researchers (see Table 2.1). Such diverse fields are bound to bring up new perspectives that enrich the general knowledge base. However, there is a

commonality to the quotes and perspectives. The universal realization of dealing with unforeseen circumstances, in the moment, is very similar across fields. Often, different terms are employed to describe the same concept. For example, the term “composition” repeatedly appears throughout both the management and music citations. In Section C. - Theatre Perspectives on Improvisation, Knapp (1989) relates improvisation to, “playing the game” (p. 383). In Section F. – Other Perspectives on Improvisation, Bjurwill (1993) in a sport-minded article relates improvisation to, “reading and reacting in parallel” (p. 1383). It is interesting that these two, vastly different perspectives could be easily interchanged.

Table 2.1- Improvisation Across Disciplines

Definition	Page	Author(s)	Year	Domain
A. Organizational perspectives on improvisation				
"the acts of composing and performing are inseparable, and each composition/performance is different from previous compositions/performances"	95	Bastien & Hostager	1992	Organizational Communication
"Improvisation in the present...to stay focused on current conditions...while maintaining project schedules"	9	Brown & Eisenhardt	1997	Product Development
"Intuition guiding action in a spontaneous way"	1	Crossan & Sorrenti	1997	Management
"Intuition guiding action upon something in a spontaneous but historically contextualized way"	5	Hatch	1997	Management
"An activity which requires no preparation and obeys no rules"	65	Mangham	1986	Management
"Improvisation - the casting around for a precedent or referent that will enable someone to deal with a circumstance for which no script appears to be immediately to hand"	41	Mangham & Pye	1991	Management
"To be composed while performed"	51	Perry	1991	Management
"Improvisation is to be distinguished from rewriting a musical in that changes are introduced during the performance by the performing individuals and not by the composer before the event"	84	Preston	1991(a)	Organizational Development
"On the spot surfacing, criticizing, restructuring and testing of intuitive understandings of experienced phenomena"	147	Schon	1983	Management/education
"a just in time strategy"	229	Weick	1987	Management
"There is no split between composition and performance; no split between creator and interpreter; and no split between design and production"	6	Weick	1993(a)	Management
"Improvisation implies attention rather than intention drives the process of designing"	351	Weick	1993 (b)	Management
"Thinking and doing unfold simultaneously; retrospective sense making"	19	Weick	1996	Firefighting management
B. Musical Perspectives on Improvisation				
"Imagination guiding action in an unplanned way, allowing for multitude of split second adjustments"	3	Chase	1988	Music
"Improvisation follows the blueprint method but this second approach. The improviser may be unable to look ahead at what he is going to play, but he can look behind at what he just played"	61	Gioia	1988	Jazz/Management
"The spontaneous creation of music"	119	Kernfeld	1995	Music
	345			
"Free from effects of previous training; the opposite of pure composition"	346	Pressing	1984	Music
"Real-time composition"	142	Pressing	1988	Music
"Unlike compositional creativity, which involves a long period of creative work leading up to a creative product, in improvisational creativity, the creative process and the resulting product are co-occurring"	1	Sawyer	1992	Music
"playing extemporaneously...i.e.. Without the benefit of written music"	378	Schuller	1968	Music
"Improvisation involves making decisions affecting the composition of music during its performance. The fundamental ideal of improvisation is the discovery and invention of original music spontaneously, while performing it"	226	Solomon	1986	Music
"The art of spontaneously creating music while playing or singing"	399	Toivainen	1995	Neural network theory applied to music

Table 2.1 (continued).

Definition	Page	Author(s)	Year	Domain
C. Theatre perspectives on improvisation				
"to substitute...staid and preconceived notions for the unforeseen, the improvised, the unknown, the world of imponderables"	59	Knapp	1989	Theater
"Playing the game ; setting to solve a problem with no preconception as to how you will do it; permitting everything in the environment to work for you in solving a problem"	383	Spolin	1963	Theater
D. Therapy perspectives on improvisation				
"Practice without prior planning"	22	Embrey, Guthrie, White & Dietz	1996	Pediatric physical therapy
"complete freedom"	221	Esman	1951	Psychoanalysis
"In clinical improvisation, therapists experience moments of spontaneity, creativity and intuition"	130	Forinash	1992	Clinical Music Therapy
"Improvisation occurs when there is evidence that the child used some lookahead [strategies] but little evidence tha the child's drawn solution was based on a completely deliberated plan"	482	Gardner & Rogoff	1990	Developmental psychology
"to be highly respectful of form even as it reworks its previous instantiations"	22*	Liechenstein	1993	Psychoanalysis
"Being, acting, creating in the moment without props and supports, without security, can be supreme play, and can be very frightening, the very opposite of play"	23	Nachmanovitch	1990	Therapy
"Spontaneous music behavior"		Orsmond & Miller	1995	Music therapy
"Juggling with ideas and feelings (in one's head) and trying out silent interventions"	81	Towse & Flower	1993	Music psychiatric therapy
E. Teaching perspectives on Improvisation				
"To move away from scripted lesson plans...an improvisational actor enters the stage with a definition of the general situation and a set of guidelines for performing his or her role, rather than working from a detailed script"	473 & 475	Borko & Livingston	1989	Teaching
"To process information continuously and make numerous ineractive in-flight decisions"	110	Cleary & Groer	1994	Health education
"Situational decision making" "To do things in lessons they hadn't planned for - to discover whether they [teachers] actually made up activities on the spot"	200 & 205	Graham, Manross, Hopple & Sitzman	1993	Physical education
"Thinking in the midst of action" "Responding to the unknown without advance preparation"	630	Irby	1992	Physical training
"The creation of [algebra] problems that fit the immediate context of the student's misunderstanding in a way that preplanned problems could not. The fact that the problems were new for both the student and the teacher meant that the problems were being composed by the teacher on the spot."	6	Yinger	1986	Teaching
F. Other perspectives on improvisation				
"Reading and reacting in parallel"	1383	Bjurwill	1993	Sports
"no agreed mechanism for changing British constitution or even any agreement about what the constitution actually contains"	18	The Economist	1995	Politics
"Role improvisation is defined as the extent to which the organization and meaning of roles are invented by the people immediately involved in a relationship...actors reinterpret, redefine, and re-structure their relationships during the on-going process of interaction"	289	Powers	1981	Sociology
"Rapid, unplanned change"	565	Volkman	1994	Anthropology

Moorman and Miner (1998a) define the construct of improvisation as, “when the composition and execution of an action converge in time, so that, in the limit, they occur simultaneously.” Moorman and Miner’s definition succinctly highlights the important contemporaneous quality of improvisation. However, their attention to time is both an important and problematic distinction. It is an important contribution because they successfully distinguish improvisation from the antiquated planning norm, which supports two separate periods of strategy formulation and implementation. This view is consistent with western perspectives on time as having a distinct past, present and future. Unfortunately, their definition is problematic because time is a relative measure that often goes unquestioned (Crossan et al. 2005). As such, definitions and research on improvisation that use Moorman and Miner’s definition will inherently be subject to temporal interpretation.

To more clearly demarcate improvisation, it is useful to look at its differences with some closely related terms; bricolage, creativity, adaptation and opportunism. A term often associated with improvisation is bricolage. Baker et al. (2003) define bricolage as making due with the resources at hand. Pina e Cunha et al. (1999) define bricolage as the ability to build solutions from available resources. Although related, bricolage can be planned and is separate from improvisation. For example, a firm might leave open the creation of something based upon assets to be determined later in the future. If they are expecting a variable outcome and realize that the future circumstances will depend on that outcome, bricolage can be planned in advance. Due to the

spontaneity of improvisation, available resources are determined at any given moment so all improvisation is a form of unplanned bricolage.

Adaptation is adjusting to the environment (Moorman and Miner 1998) or external conditions (Campbell 1989) and is different from improvisation because it can be conceived before its implementation. Learning is the discovery, retention and exploitation of knowledge (Moorman and Miner 1998). Unlike improvisation, experiments can be explicitly devised for the purpose of learning. Opportunism is seizing attractive, unexpected developments (Moorman and Miner 1998) and can also be anticipated or planned.

Time and Improvisation

Implementation schedules are inextricably linked to time. Through the conceptual expansion of time, strategies can be reduced into a series of actionable tactics. The two most common forms of temporal organization are clock time and event time. Clock time has become so commonplace that it seems tautological. Clock-time management is most notably distinguished by triggers in change due to temporal shifts and not actual problems or events (Crossan et al. 2005). Event-time is based on meaningful events and their subsequent responses.

From an implementation schedule perspective, these forms of time conceptualization are usually separate. Either the passage of time or events drives the plan. Both clock time and event time have been shown to possess contingent advantages.

Implementation schedules based on clock time have been demonstrated to drive innovation output (Brown and Eisenhardt 1997). Without arbitrary forces such as the passage of time, pressures to produce might not be as high. Event time has been shown to be more advantageous in turbulent environments. Clark (1985) demonstrated that under conditions of uncertainty, individuals with heterogeneous time reckoning outperform individuals with homogenous ones. Instead of focusing on coordination and communication of shared schedules, major and obvious milestone completion allows for more optimal team production. While accountability, and therefore performance, can be increased through both temporal management techniques, they are most commonly employed in absence of each other.

“Improvisational processes are a means for transcending these traditional dualities” (Crossan et al. 2005 p. 134). Organizational improvisation must be responsive to changes in the environment and intend to shape that same environment. It can serve as a synthesis between event time and clock time. Under the right circumstances (experimental culture, real time information and communication, memory, expertise and teamwork skills) improvisation can maximize a firm’s ability to implement their strategic plan (Crossan et al. 2005).

The temporal component of improvisation has caused some specific debate. Baker et al. (2003) note that Moorman and Miner’s (1998) definition refers to “composition” and is assumed to imply both novelty and intentionality of action. These two components of improvisation are important components of the definition and should be explicitly accounted for. Dyba (2000) argues that the substantive convergence rather

than the temporal convergence is an important distinction between rapid sequencing of distinct action steps and true improvisation.

Given the relative nature of time, collective agreement on this point is unlikely. However, it does illustrate one of the most pressing issues in improvisational theory. Does deviation from intention necessitate improvisation? Or, does some measure of cognitive reflection and strategic response that is less than immediate indicate something other than improvisation? I believe that it is the former and not the latter. Plans are an attempt to model the future. The length of the planning cycle is a discretionary choice made by the planner. Any deviation from the plan before the completion of the planning cycle equals an improvisational action. Contingency plans represent the planner's ability to predict and prepare for deviations from plans.

Improvisational Units of Analysis

Different units of analysis contribute to the construct's ambiguity. Vera and Crossan (2004) provide a summary of the characteristics of improvisation across levels identified in prior research (see Table 2.2). The table helps clarify the subtle distinctions of improvisation in each unit of analysis; individual, group-organization and organizational environment. Individual characteristics of improvisation include important personality traits that managers can identify or enhance in order to improve, or potentially, to discourage improvisation. Group and organization characteristics highlight the network identities, cultures and processes that typify improvisational

clusters. Finally, organization-environment characteristics typify the macro-environmental settings needed to foster improvisational activity.

Table 2.2 - Characteristics of Improvisation

Individual	Willingness to forego planning and rehearsing in favor of acting in real time**
	Well-developed understanding of internal resources and the materials at hand*
	Proficient without blueprints*
	Ability to identify minimal structures for embellishing*
	Predisposed to recognize partial relevance of previous experience to present novelty*
	High confidence to deal with nonroutine events*
	Skilful at paying attention to performance of others*,**
	Preference for and comfort with process rather than structure, which makes it easier to work with ongoing development, restructuring, and realization of outcomes, and easier to postpone the
	Willingness to risk the 4 C's - the desire to be consistent, comfortable, confident and competent
	Solid base of technical skill*,**,***,****
Group	Individuals take the lead at different times**,***
	Ability to agree on minimal structures for embellishing*
	Presents of associates similarly committed to and competent at impromptu making do*,**
	Skilful at building on performance of others to keep the interaction going and to set up interesting possibilities for one another*,**,*
	Ability to maintain the pace and tempo at which others are extemporizing*
Organization	Focused on coordination here and now and not distracted by memories or anticipation*,** action*,****
	Common goal****
	Tolerance for error within organization - especially reward systems**
	Culture of freindship versus professionalism**
	Emotional tension and release***
Organization- Environment	Real-time information flows****
	Communion among players and audience members***
	Customer has a tolerance for error**
	Environmental turbulence and unpredictability requires improvisational capability**,**** Need to be open to cues from the environment**

* Weick, 1998.

** Crossan et al., 1996

***Crossan and Sorrenti, 1997; Hatch, 1998

****Moorman and Miner, 1997,1998

Pina e Cunha et al. (1999) petition for clarity of the organizational meaning involved with the usually closely coupled terms “organization” and “improvisation”.

They are careful to preserve the different characteristics for each unit of analysis. To move past what they deem to be an overly simplistic interpretation of “collective equals organizational” explanation, they define organizational improvisation as “the conception of action as it unfolds, by an organization and/or its members , drawing on available material, cognitive, affective and social resources.”

Conceptual and Empirical Research on Improvisation

The unpredictability in timing inherent to improvisational opportunities has limited the construct’s measurement and empirical research. Most of the extant research and literature is conceptual. Jazz and Theatre have both been used as metaphors for communicating and educating (Dennis and Macaulay 2003; Meyer and Frost 1998; Vera and Crossan 2004; Weick 1998). Jazz based research led to advancements in understanding improvisation through detailed explanations of how musicians work individually and collectively to produce music that constantly pushes the edge of chaos looking for insight and novelty. In jazz, there is an inherent, ongoing tension to improvise on something while maintaining the essence of the scripted music (Weick 1998). However, the novel output of jazz is not simply serendipity. Barrett and Peplowski (1998) point out that jazz is actually very structured. There is an underlying framework to the creative freedom of each musician. This structure “provides the necessary backdrop to coordinate action and organize choice of notes” (Barrett and Peplowski, p. 558). As Charlie Mingus, a famous jazz musician once explained, “you

can't improvise on nothing, you've gotta improvise on something" (Kernfeld 1995, p. 119).

Vera et al. (2005) augment the jazz metaphor with theatrical improvisation. Theatre is a more advantageous metaphor than jazz because it is more transparent. Theatre's use of speech, gestures and movement is more easily relatable to organizational improvisation. Music takes additional training and exposure to fully grasp. Through the use of the theatrical metaphor, Vera et al. were able to explain collective improvisation in teams and suggest how that might lead to innovative performance of firms.

Recently, Dennis and Macaulay (2007) argued that improvisation is a key element for achieving a market orientation. A market orientation is one of marketing's most fundamental tenants. By linking the need for firms to improvise in order to become market oriented, Dennis and Macaulay attempt to integrate improvisation into one of marketing's core tenants.

Early interest from management researchers in the conceptual potential of improvisation were generally unabashed supporters of its communicative, metaphorical promise. However, there were a few petitions for caution. Hatch (1998) warned that, "organizational researchers may fall prey to romanticizing improvisation's likely value for organizations." Dennis and Macaulay (2003) further explain the danger of over-improvisation. They speculate that unanticipated change stemming from improvisation could lead to confusion regarding the organization's purpose in external and internal markets.

More often, researchers point to a balance between the good and bad outcomes associated with improvisation (Vera and Crossan 2005; Weick 1998). Weick (1998) speculated that the relative speed to implementation could provide firms with a source of competitive advantage. However, he also noted that bursts of improvisation could lead to an overabundance of new products and processes that overextend the firm's support capabilities.

Vera and Crossan (2005) found that improvisation can have positive effects on team innovation when moderated by the right team and contextual effects such as expertise, real time information, experimental culture and teamwork quality. Moorman and Miner (1998a) found that improvisation has both negative and positive outcomes for firms and also note the unique qualities of organizational memory on performance. Their study showed that improvisation can help problem solving and allow firms to capitalize on unique opportunities. They operationalized these benefits as product and process outcomes with positive and negative results of varying frequency and impact. Dyba (2000) concludes that there are skilled and unskilled improvisations that can lead to either good or bad results. He speculates that the management of the amount and access to expertise and knowledge is at the core of improvisational returns. Too much reliance on memory limits exploratory behavior needed for innovation, and too much risk taking leads to fruitless experimentation and repeated failures.

Research is needed to further expose the contextual and temporal conditions that may predict improvisational outcomes. The amount of environmental turbulence and existing knowledge stores are the most commonly cited contextual predictors (Dyba

2000; Moorman and Miner 1998a; Weick 1998). In areas of increased turbulence, too much planning can consume time and resources while providing counterproductive guides to action. Memory both precludes the creative initiation of improvisation while at the same time increasing the organization's capability of reaping improvisational benefits.

Much of the extant empirical work on improvisation has been qualitative. Three of the more salient examples include the context of the Mann Gulch disaster (Weick 1993), the World Trade Center attacks on September 11th, 2001 (Mendonca, 2005) and the story of a massive navigation failure of a large ship barreling towards a dock (Hutchins 1991). The first exemplary qualitative example explores the Mann Gulch disaster of 1949. Weick (1993) describes how a group of firefighters were forced to improvise in order to survive after everything that they thought they knew suddenly unraveled. The Mann Gulch disaster demonstrates how improvisation can partially prevent disruptions of sensemaking that lead to disintegration. Memory and routines prevented most of the firefighters from escaping alive. What is normally considered an asset, their experience, turned into a liability, a rigidity to thinking in the moment. An illustrative example of that alternative also emerges from the review. A foreman managed to escape impending doom by doing the unthinkable, starting a new fire. By burning the surrounding brush that acted as fuel, the larger fire swept by under-fueled, saving his life.

The second exemplary qualitative study on improvisation reviewed the events of September 11th, 2001 (Mendonca 2005). The tragedy of the terrorist attack hit a

particularly sensitive target. Mendonca (2005) shows how the interdependent infrastructure systems proved to be a liability for responders on that fateful morning and for rescue efforts long after. The salient context that unraveled before the world serves as a powerful tool to discuss the phenomenon of improvisation. The analysis supports the need for emergency responders to be trained with improvisational techniques in order to better and more safely help during times of crisis.

The third and last exemplary qualitative study reviewed a fortuitous research opportunity aboard the pilot house of a large navy ship (Hutchins 1991). The researcher happened to be aboard studying a different organizational phenomenon when he found himself in the middle of a rare opportunity. As the ship was preparing to dock the propulsion system suddenly failed. This left the crew without the ability to communicate and maneuver as trained. The chaos that followed gave way to the improvisational creation of new systems of organization. The study showed the ability of organizations to adapt and learn outside of the planned environment. It also describes the difficult nature of improvisational research. If Hutchins had not been a trained social researcher in the midst of another project, he could not have predicted the improvisational events and thus reported them.

The interest developed in improvisation has not resulted in a significant number of quantitative studies. Three major exceptions exist. Moorman and Miner (1998a) investigated the impact of improvisation in the new product development process for two large companies. The dependent variables included new product processes and outcomes that were made up of two measures of product improvement and four measures of

process effectiveness. The independent variables included environmental turbulence, real-time organization information, and organizational memory. The results of their study support concerns that improvisation can have mixed effects. The negative effects show improvisation reduces new product effectiveness. The results also support the idea that memory serves internal improvisation processes and product outcomes and that improvisation can control the effects of internal memory, which can be managed for effective outcomes. Finally, they noted that memory has a paradoxical effect on improvisation. It decreases the likelihood of engaging in improvisational behavior but at the same time it increases the likelihood of successful innovation. This paradox insinuates that there is both a floor and a ceiling effect of memory, and organizations must manage their knowledge stores somewhere in the middle.

A second study by Vera and Crossan (2005) looked at the impact of improvisation on innovation moderated by expertise, teamwork, experimental culture, real time information, communication and memory. Five of six moderators proved to be significantly moderating effects. Memory was not supported as an additional moderator but the researchers believe their inconclusive finding were partially the result of ineffective memory instruments. Ultimately, they concluded that improvisation and innovation are equivocal without the presence of these important moderators and that improvisation can be taught and managed within organizations.

A third study by Stotegraaf and Dickson (2004) addresses post-plan improvisation and marketing planning capabilities. They surveyed Fortune 1000 marketing planners about their plan's comprehensiveness and budgets. They discovered a paradox exists.

Firms with stronger marketing capabilities were less likely to improvise because of capability rigidities. Yet, when firms with stronger marketing capabilities did improvise, their long-term performance relative to their competitors was better.

The review on improvisation reveals an important gap. Little attention has been given to the contextual differences among improvisations. Whether this is due to pragmatic decisions that concede to the difficulty of measuring an unpredictable phenomenon or this is because the researchers assume the differences are not meaningful is not known. However, until more empirical evidence regarding the extant types of improvisations exists, these assumptions remain problematic.

Research Questions

The previous two sections of this literature review have independently identified gaps in their respective literatures. The marketing planning literature concludes that the planning and performance links do not fully capture the management effects occurring between the time the plan is created and when the performance measures are taken. This suggests that the implementation process needs to be more closely investigated. Further, the management of the plan and efforts to keep that process dynamic and current are not adequately addressed. The improvisation section exposed the need for more detailed investigation into the extant types of improvisations. Until now, measures have generally aggregated all occasions of improvisations as one generalizable phenomenon.

This final section will address the fusion of marketing planning and improvisation and then develop the research questions that will direct the rest of this dissertation. To do this, some review is necessary.

Historically, marketing theory and the entrepreneurship literature have depicted planning as a rigid process of formulating and implementing strategy and overemphasized its efficacy (Dennis and Macaulay 2003; Miner et al. 2001; Moorman and Miner 1998b). Dennis and Macaulay (2003) integrate Piercy and Morgan's (1994) marketing planning model with jazz metaphors to demonstrate the potential importance of including improvisation in strategic marketing. According to Piercy and Morgan, planning exists in the analytical, behavioral and organizational dimensions. Dennis and Macaulay (2003) posit that improvisation permeates each of these dimensions and should be addressed, managed or limited accordingly.

Entrepreneurial literature has historically implied a design-precedes-execute framework (DPE). In contrast, Baker et al. (2003) looked at the foundation activity of new ventures. Their results indicated that firms in knowledge-based industries more often originated from improvisational reactions to market opportunities than from premeditation or traditional planning models. They noted that the (DPE) framework, "assumes a mainly linear process in which entrepreneurial volition leads to gestational planning activities" (p.256). However, their results showed that knowledge-based firms were more likely to start from a more organic, improvisational launch. Founders who already worked in the same industry and market as employees of another company, were more prevalent than DPE's. Often times, the opportunity to start the company stemmed

from a missed opportunity of their employer or a key relationship that reduced the risk of leaving their existing firms. They also noted tactics were leading to unintended strategic changes. Classic DPE models would require the reverse, strategies to determine tactical changes. This surprising finding further questions the traditional DPE framework.

Marketing planning is a process for assessing the environment, developing strategy, plotting the implementation of that strategy and learning from experience. The history of marketing planning has followed a predictable path of phenomenon assertion, counter-assertion and a slightly qualified consensus (Smith 2005). The principles of marketing are straightforward and logical. The realities of managing marketing are not as simple. The next generation of marketing management research needs to look for practical understanding about executing plans in increasingly turbulent environments (Grant 2003). Improvisation is central to this research because it unpeels the mysteries of how organizations manage “on the fly.” Until now, most of the improvisation literature has focused on artistic metaphors from jazz and theatre. However, they may have taken us as far as they can go and should not be overly compared to inherently less risk adverse, business applications. The next phase of research should look to expand our understanding of the improvisation phenomenon in its actual business context. The difficulty in doing this is not to be underestimated. By definition, improvisation happens unexpectedly. Deviating from the plan is never explicitly anticipated; otherwise the plan would have been created or changed accordingly. Improvisational research can be extremely beneficial to the marketing literature because it will illuminate some techniques beyond planning for how to “do” marketing. Dynamic new tools are needed,

along with the underlying knowledge to produce them, to help managers better combat issues where they must work outside of the expected opportunities, away from their plans, but without losing the investment and focus that planning provides.

The previous review of the marketing planning literature leads to a focus on improvisation. The elusive nature of improvisation seems to have prevented wide-spread empirical investigation. However, its expected frequency and its potential impact make it an important topic to pursue. Having a market orientation makes marketing planning particularly susceptible to post plan improvisation. Yet the nature of post plan improvisation is relatively unknown. The previous quantitative studies have aggregated improvisation and by doing so assume equality among differing types of improvisation. However, this assumption is unfounded and the concept of post plan improvisation needs more specific research to identify the different types that exist.

Pina e Cunha et al. (1999) argue for, "metaphor to be gradually replaced by other research methods, fitter to a more mature body of knowledge" (p. 336). They conclude that, "the building of a useful typology of this phenomenon seems only possible through a wide empirical grounding" (p. 311). Previous literature has looked at the different levels of improvisation (Weick 1998; Moorman and Miner 1998b) but has not identified the specific types of actions that firms improvise on. Given improvisation's illusiveness, noted by the lack of empirical work, and confluence, noted by the ongoing attempts at defining the term, knowing more about the types of actions that firms improvise on would help remedy these situations. A taxonomy is the first step to building a typology and could begin to address what types of post plan improvisations might lead to more

successful outcomes. The following research questions about improvisational implementation drive the following dissertation:

- What are the different types of post plan improvisations of strategic marketing plans?

Firms plan and improvise. When faced with new information it is important for firms to know when to follow their plans and when to improvise. A taxonomy could help provide the framework for investigation that could deliver insights that help firms address that dilemma. By identifying the full spectrum of improvisational actions, future research can begin to look for contextual determinants of success. The next chapter will detail the methodology used to address these questions.

CHAPTER III

METHOD

“The nature of “good practice” in marketing management and the coordination of marketing activities with other functions are currently nonquantifiable phenomena; they are so complex it is impossible at this early stage of theory development to know what to count.”
- Bonoma, 1985 p. 203

Introduction of the Critical Incident Technique

Bonoma’s quote supports the need to focus on identifying and defining important marketing phenomenon rather than prematurely testing for evidence of causality. One method that empowers such studies is the critical incident technique (CIT). CIT was introduced in an occupational psychology study that looked at flight school failures of pilots (Flanagan 1954). Since then, the method has been used as part of a behavioral event interview (McClelland 1976; Spencer 1983), to investigate trust in the management literature (Butler 1991), and to explore business development techniques in the entrepreneurship literature (Chell et al. 1991; Wheelock and Chell 1996). CIT first appeared in the marketing literature in 1975 (Swan and Rao 1975). Bitner et al.’s (1990)

seminal study inspired a wave of service research. Eighty-nine percent of the one hundred and forty one CIT marketing studies were published in the thirteen years following their article. Gremler's (2004) meta-analysis documents the highs and lows of the method's use over the last thirty years. He critiques the extant studies on their sampling, reliability, objectivity and systemization. Of the one hundred and forty one studies, he identifies six seminal pieces that he suggests serve as exemplars for future research.

Accordingly, and in order to investigate the previously outlined research questions regarding post plan improvisations, this study uses the critical incident technique (CIT). This method particularly matches the nature of improvisational research for five reasons. First, the variance in backgrounds and business contexts is not expected to influence the likelihood of post plan improvisation. However, constructing quantitatively based surveys with universal terminology and satisfactory reliability would be difficult. CIT allows respondents to reflect in their normal way of thinking and in their own words. The CIT method is non restrictive and produces unequivocal, concrete information (Chell 1998). Second, CIT is primarily an inductive process. The sparse empirical literature on improvisation would benefit from the foundation of an exploratory method used to create knowledge about the phenomenon. Because of its inductive capability, CIT does not require a priori hypotheses. Instead, new concepts and theories will be formed from patterns that emerge from the responses. Third, the next generation of marketing planning must demonstrate a new, more dynamic understanding of the planning and implementation process. The planning phase and implementation phase can

no longer develop independently. CIT is particularly adept at producing an accurate and in depth records of events. This information source will serve as an empirical starting point for future improvisationally-based research in tune with the modern understanding of marketing planning. Fourth, as planning's foothold has lost some of its stature (Mintzberg 1994), practitioner buy-in will be critical. The rich, verbatim stories that result from CIT responses provide powerful and vivid insights into the phenomenon. These stories make strong communication tools that might rebuild interest in academic studies focused on strategic planning. Such insights could produce reliable and valid academic contributions, and because of the information origin, the output could also suggest very practical solutions for managers. Finally, the method has been praised as a culturally neutral method. Firm differences in industry and size are very similar to cultural differences (Chell 1998). With CIT there is no a priori determination of what will be important, and therefore voices and opinions of vastly different groups are able to be accounted for thus producing theoretical foundations that are truly generalizable.

There are drawbacks and dangers to using CIT for both the researcher and subject. From the researcher's standpoint, qualitative methods studies are often more heavily scrutinized for reliability and validity because incidents can be misinterpreted (Desphande 1983) or misunderstood more easily than qualitative data. Multiple, independent coders and hold out samples are recommended to bolster confidence in reliability and validity. Additionally, the researcher determines the categories for discussing the results of the study. This process requires the researcher to systematically inspect the responses for patterns. Errors in classifying the responses can be particularly

dangerous due to the foundational intentions of such exploratory research. Systemization of the data must be closely scrutinized or future research efforts that build from its foundation will be unfounded. From the subject's standpoint, the retrospective nature of the questioning introduces the chance for recall bias, memory lapses and consistency factors (Chell 1998). It requires the respondents to provide accurate and truthful feedback. Additionally, the CIT process is somewhat intrusive and taxing, and low response rates are common.

These six studies are presented in Table 3.1 and wherever possible will be consulted for best practices in the upcoming study. Gremler (2004) summarizes his conclusions in a pragmatic checklist for using the CIT in the future (see Table 3.1). By following this checklist, this study will attempt to maximize the positive attributes of CIT mentioned above and reduce its limitations.

Table 3.1 - 6 Seminal CIT Studies (Gremler 2004)

Title	Author(s)	Journal	Year	Units of Analysis	# of incidents	Categories
Service Breakdowns: A Study of Critical Incidents in an Airline	Edvardsson	International Journal of Service Industry Management	1992	Service encounters of an airline	320 passenger reported incidents and 80 airline employee reported incidents	Passengers perception of the source of the critical incident, The actions of the passenger, The effect of the critical incident on the passenger's relations with the airline
Critical Service Encounters: The Employee's Viewpoint	Bitner, Booms & Mohr	Journal of Marketing	1994	Service encounters	774 (397 satisfactory and 377 dissatisfactory)	Satisfying and Dissatisfying Incidents - Response to Failures, Problem Customers, Response to Requests, Unprompted Action;
The Service Encounter: Diagnosing Favorable and Unfavorable Incidents	Bitner, Booms & Tetreault	Journal of Marketing	1994	Service encounters	699 (347 satisfactory and 352 dissatisfactory)	Satisfying and Dissatisfying Incidents - Employee Response to Service Delivery System Failure, Employee Response to Customer Needs and Responses, Unprompted and Unsolicited Employee Actions
Customer Switching Behavior in Service Industries: An Exploratory Study	Keaveney	Journal of Marketing	1995	Switching Behaviors	516	Pricing, Inconvenience, Core Service Failures, Failed Service Encounters, Responses to Failed Service, Competition, Ethical Problems, Involuntary Switching, & Other
Process-Oriented Measurement of Service Quality	Stauss and Weinlich	European Journal of Marketing	1996	Sequential Service Encounters	347 (206 positive and 141 negative)	Reception at the Airport, Transfer to the Club Resort, Arrival at the Club Resort, Check In, Way to the Hotel Room
Self Service Technologies: Understanding Customer Satisfaction with Technology-Based Service Encounters	Meuter, Ostrom, Roundtree and Bitner	Journal of Marketing	2000	Encounters with Self Service Technologies	823 (459 satisfactory and 364 unsatisfactory)	Satisfying Incidents - Solved Intensified Need, Better Than Alternative, Did its Job; Dissatisfying Incidents - Technology Failure, Product Failure, Poor Design, Customer-driven failure

As a qualitative method, CIT does not generate generalizable conclusions. The primary use of the critical incident method is to extract categorical meaning about under studied phenomena. In a few previous cases, researchers have used additional quantitative measures to gain a greater perception of the incident and subsequent behavior (Meuter et al. 2000; Hoffman et al. 1995). This study follows that course and includes a single, all inclusive measure of attribution and two descriptive measures regarding planning cycle length and size of the firm. The attribution measure was adapted from Meuter et al. (2000). It is important to note that the inclusion of

quantifiable measures does not imply the intention to generalize the data. Instead, the data that are collected can be more rigorously analyzed and richly reported.

CIT has rarely been used outside of services research. However, Gremler's (2004) review of the method and its productivity leads him to conclude that, "the CIT method should be used beyond just services in such contexts as sales management, marketing management, channels, negotiation and bargaining, and consumer behavior" (p. 78). He adds, "Given the contributions made by many of the studies using the CIT method, researchers might consider using the method in the future to study a variety of issues in such contexts."

The unit of analysis of this study is post plan improvisation of marketing plans. A critical incident will be defined as the entire event surrounding a deviation from a firm's intended marketing plan including its cause, the deviation from the plan and associated outcomes. Each incident of post plan improvisation includes three units of observation (see Figure 3.1).

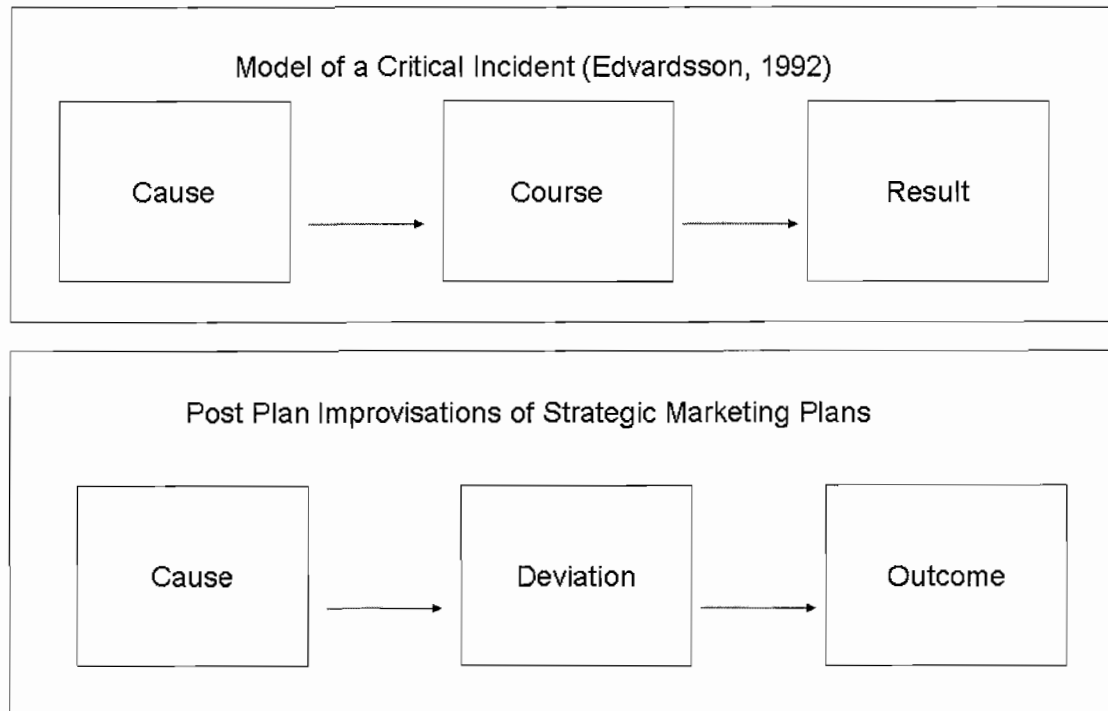


Figure 3.1 – Models of Critical Incidents and Post Plan Improvisations

A noticeable difference in this study's criteria for inclusion than previous improvisational research is the lack of temporal requirements. Instead, the critical incidents are broadly defined to cast a wide net and include an action that was not planned for in the marketing plan. The absence of explicit strategy and tactics is an important part of planning and learning. Critical incidents are meant to include surprising events and information to look at the planner's attribution of blame. Should they have planned more rigorously? Or, do they believe that no amount of planning would have prepared them for such an event or discovery? The respondents will be asked to recall explicit occasions when their actions were not consistent with their marketing plan and attempt to associate those actions with an outcome. Responses will be scrutinized for

events that do not explicitly communicate an incident that deviates from their marketing plan. Other business related issues such as accounting, finance or human resource issues that do not have some connection to marketing will be eliminated from the data set. The 2004 AMA definition of marketing will be used as the basis for determining marketing's relevance. The definition states that marketing is, "an organizational function and a set of processes for creating, communicating and delivering value to customers and for managing customer relationships in ways to benefit the organization and its stakeholders" (Keefe 2004, p. 17).

Questionnaire

A questionnaire was created using Qualtrics, an online survey development instrument (see Table 3). The survey questions were adopted from Meuter et al.'s exemplar CIT study because of its online format. Additionally, the survey was changed from a service context to a marketing planning context to capture the incidents of post plan improvisation. Pretests of the survey were sent in two separate rounds to one-thousand members of the eventual target database. The goal of the pretest was to determine the accessibility of marketing planners and the potential depth of information shared regarding the critical incident. The first test provided only a 2.3% response rate, below what was needed. The depth of the critical incident answers was sufficient and led to the second pretest. An incentive was offered. Respondents of the survey were offered a free downloadable business toolkit with business calculators and sample plans. The incentive raised the response rate to an acceptable 10.3%.

The survey was designed to capture three areas of information. First, the survey inquired about the planner's company characteristics. Four questions attempted to solicit location, revenue, age and product information. The second area asked for information about the planner. Five questions attempted to solicit job title, managerial focus, education, and planning frequency and skill information. The third area of the survey vetted the planner for consideration into the study and then probed for open ended information about post plan improvisations and characteristics of that plan and their feelings of attribution regarding the deviations that occurred. Additional contact information was asked for based on the respondent's willingness to be contacted for more detailed information.

Table 3.2 - Questionnaire (Developed in part from Meuter et al. 2000)

Question #	Question	Type of Response
	Tell us about your business.	
1	Where is your business located?	Multiple Choice (11)
2	What was your last year's revenue?	Multiple Choice (7)
3	How many years has your business been open?	Open Ended
4	Which category best describes your business? (service or product based)	Multiple Choice (2)
	Tell us more about you.	
5	What is your job title?	Open Ended
6	In which capacity of your job do you spend the most time working?	Multiple Choice (5)
7	What is your educational background?	Multiple Choice (7)
8	How would you rate your marketing planning skill level?	Multiple Choice (5)
9	During the course of your career, how many marketing plans have you been involved with developing?	Open Ended
	Tell us more about the last marketing plan you created and attempted to implement.	
10	Did you create a marketing plan in the last eighteen months?	Yes/No
11	If you did create a marketing plan, did you attempt to implement that plan?	Yes/No
12	Which components of a marketing plan did your plan include	Check All that Apply (6)
13	How many pages long was your marketing plan?	Open Ended
14	This plan was intended to last _____ months before it is formally reviewed and another plan is created.	Open Ended
15	What was the marketing plan's focus?	Multiple Choice (7)
16	When you attempted to implement from your marketing plan, did you ever deviate from your original plan	Multiple Choice (4)
17	Please consider one occasion when you deviated from your marketing plan. Describe the circumstances leading up to the incident. Please provide as much detail as possible (a few sentences to a half page).	Open Ended
18	Describe what happened during the incident. What specific details do you recall that made the incident memorable. Please provide as much detail as possible (a few sentences to a half page).	Open Ended
19	What was the specific outcome of the incident? Was it successful? Was it unsuccessful? Not sure? Please provide as much detail as possible (a few sentences to a half page).	Open Ended
20	Do you believe that if you spent more time during the planning process you could have been better prepared and eliminated the deviation you just described?	Yes/No
21	Would you be available to answer further questions about this survey if the researcher needs additional information?	Yes/No

Note: Additional questions were asked if the respondent indicated that they were not eligible for consideration into this study to better understand how firms that don't deviate from their plans manage to do so.

Respondent Characteristics

Strategic planning is generally reserved for upper management and professional marketing specialists. Unlike other CIT studies that interview likely service participants, this study must question a relatively elite group of respondents in order to illuminate the subject of post plan improvisation. Strategic marketing planners were targeted based on a behavioral interest corridor. An internal database of the world's leading provider of business and marketing planning software was used to survey likely planners. The sample population consists of 15,000 marketing planning contacts that opted-in for future contact from the software company. The software company's products are sold online and in major retail outlets in the United States and Great Britain. Their name and logo were included in the recruitment e-mail. The study's academic purpose, a detailed explanation of the questionnaire and a hyperlink to the Qualtrics survey were also included in the e-mail. In addition to the warm introduction by the software company, a summary of the study's findings and a free, electronic, business toolkit were offered. This was expected to generate the desired number of responses and usable incidents of post plan improvisation. Based on previous CIT studies (Gremler 2004), 300 to 500 usable critical incidents should provide the number needed to systematically develop categories.

Data Characteristics

Respondents were asked to provide a description of an incident in which they deviated from their existing marketing plan. Through three, open ended questions, they

were probed for details on 1) what led up to their deviation, 2) descriptions of the deviation itself and 3) the corresponding outcome. Pretests showed that both successful and unsuccessful outcomes were likely to be reported. Due to the level of detail being requested, each respondent were only asked to provide information about one complete incident and were free to provide an incident with a positive or negative valence.

1424 surveys were returned. This represents a 10.2% return rate. In order to limit the intrusion of its database members, the software firm did not allow follow up e-mails. However, the 10.2% return rate meets other standards of online survey responses (Sax, Gilmartin and Bryant 2003). Of the total 1424 responses, 891 responded that they had been involved with creating a marketing plan in the previous eighteen months and attempted to implement that plan. 70 of those respondents indicated that they had not deviated from their plan during its implementation, leaving 821. 131 of these respondents did not provide responses to the three primary qualitative questions regarding their experience of post plan improvisation. These respondents were removed leaving a total of 690 reviewable responses.

Data Quality

The 690 remaining responses were examined for their completeness, sensibility and usability. Judges A and B performed the initial data screening, reviewing the responses on the criteria that the respondent attempted to share an incident of post plan improvisation in enough detail to be useful. Because the questionnaire was delivered online and incentivized based on its completion, some respondents hit random keys in the open-ended survey response sections to allow the survey management software to

continue towards completion of the survey. Non-sensible answers that did not form coherent or logical responses were identified, discussed and then eliminated.

Simultaneously, Judges A and B investigated the respondent's answers to the three open ended questions in their entirety. Although the questions were designed to help the respondent streamline their answers in a complete and temporally consistent manner (Cause→ Deviation→ Outcome), pretests showed that by reviewing the group of answers as one complete set, the respondent's intentions could be better understood. The judges systematically identified the presence of a cause, deviation and outcome. If there was no indication of a cause or a specific deviation then the response was eliminated. 275 responses were eliminated during the vetting process. Examples of responses that were eliminated included incomplete information, generalizations of improvisations rather than the specific identification of one incident, incoherent responses, extremely short responses, and vague answers. These reviews resulted in 415 usable responses. (During the coding process, judges were unable to agree on the meaning of an additional 31 incidents. They were eliminated and the final number of incidents as presented in TABLE 3.3 was 384.)

Table 3.3 - Descriptive Statistics

<i>Firm</i>	Count	%	Mean (Median)
Location			
US	273	71%	
Canada	24	6%	
Mexico	23	6%	
Europe	6	2%	
Asia	24	6%	
Africa	19	5%	
Australia	8	2%	
South America	7	2%	
Annual Revenue			
> \$50	70	18%	
\$50K - \$99K	53	14%	
\$100K - \$249K	61	16%	
\$250K - \$999K	55	14%	
\$1 Million - \$2 Million	28	7%	
\$2 Million - \$10 Million	51	13%	
\$10 Million or more	63	17%	
Age			17.25 (7)
<i>Planner</i>			
Education			
No College Degree	45	12%	
Undergraduate Degree - Non Business	87	23%	
Undergraduate Degree - Business	101	27%	
Masters or Above	148	39%	
Skill Level			
Novice	14	4%	
Below Average	29	8%	
Average	135	35%	
Above Average	154	40%	
Expert	52	14%	
Experience (No. of Plans)			28.88 (10)
<i>Plan</i>			
Avg. No. of Components			4.78 (5)
Pages (Avg.)			25.43 (20)
Duration of Plan Cycle			11.7 (12)
<i>Implementation</i>			
Deviation			
Never	0	0%	
Once	26	7%	
A Few Times	287	75%	
Very Often	71	18%	
<i>Reflective</i>			
Attribution			
Plan could have been prepared to handle situation	154	40%	
No amount of planning would have prepared to handle situæ	229	60%	

This sample represents a convenience sample for attracting enough qualified respondents to build a taxonomy. Unlike deductive methodologies that require representative samples in order to extrapolate to the entire population, the CIT requires an exhaustive sample to be collected until the frequency of new types of incidents fall below a given threshold (Keaveney 1995; Flanagan 1954). The frequency of the categories that emerge from the study are not meant to be generalizable to an entire population. However, there is a danger in using a convenience sample with CIT. If this sample does not include segments of the total population that have unique perspectives for identifying and communicating the phenomenon of interest, this might lead to a less than exhaustive set of categories.

This sample derives from a single firm's database. Although they are the world leader in marketing planning software, their list would not include groups of planners that do not have access to their primary distribution channels such as retail outlets in the U.S. or the internet. Additionally, marketing planners that do not use software but rather that create outlines and plans using other software products, textbooks, tradebooks, or freehand methods would also not be included in this sample. Additionally, very large corporations often have custom-built software solutions and might be underrepresented. Although their exclusion certainly provides a limitation to the external validity of this study, there are reasons that these alternate populations are not suspected to contain meaningful differences relative to the phenomenon of post plan improvisation. First, the literature suggests that marketing planning remains a widely used business process for implementing the components of marketing management (Dibb 2002). As noted in Table

4, the geographic, revenue, age and industry distributions of the respondents include a wide variance. Since repetition of the phenomenon is not as important as a single instance of inclusion, the demographic diversity of the sample provides some reassurance that unidentified occasions of PPI are not absent. Of course, this needs to be further validated in future research by using samples beyond this single source.

The job titles given by the respondents would suggest that the sample does represent an elite group of managers. Table 3.4 shows the job titles of the respondents. 78% of the respondent's job titles are from upper management positions that are difficult to access. This supports the value of this database.

Table 3.4 - Respondents' Titles

Title	Percentage
Owner/Principal	21%
President, CEO or C-Level	27%
Manager, Director or Vice Presiden	30%
Sales/Business Development	6%
Consultant	5%
Other	11%

Checks for Nonresponse Bias

Additional checks for a nonresponse bias were conducted (see Table 3.5). Because the database was limited to a single e-mail solicitation for participation, subjective estimates were used to estimate the characteristics of the nonresponders (Armstrong and Overton 1977). The means of early responses were compared to the means of late responses. A response was considered late if the response did not return

with 36 hours after being sent. Four characteristics of the firm, planner and plan were compared and no significant ($p < .05$) differences were found. Eight of the 12 characteristics are categorical variables (Revenue, Location, Age, Service/Manufacturing, Capacity, Education, MPSkill and Deviation). Their mean values do not have nomological validity but they do provide the basis for statistical comparison of differences.

Table 3.5 - Check for Nonresponse Bias

	Mean		F-Value	Sig.
	Early	Late		
Firm Characteristic				
Revenue	3.95	3.58	2.45	0.12
Location	3.98	4.49	3.20	0.08
Age (Categorical)	1.51	1.41	3.30	0.07
Service/Manufacturing	1.31	1.33	0.06	0.81
Planner Characteristic				
Capacity	2.15	2.03	0.68	0.41
Education	3.72	3.77	0.00	0.97
MPSkill	3.54	3.48	0.36	0.55
Plans Completed	22.46	45.51	2.33	0.13
Plan Characteristics				
Total Plan Components	4.78	4.79	0.00	0.95
Number of Pages	25.51	25.23	0.01	0.92
Cycle Duration	11.44	12.36	1.21	0.27
Deviation Frequency	3.13	3.07	1.12	0.29

CHAPTER IV

RESULTS

Overview

This chapter presents the results of the empirical investigation described in CHAPTER III. The respondent characteristics are detailed, followed by a description of the data characteristics and quality. Next, the data analysis and the process of classifying the incidents are described. An additional test for method bias was included in the study and those results are included after the presentation of the categories of post plan improvisation. The categories are supplemented with two additional classification efforts that produce subgroups.

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Strategic planning is generally reserved for upper management and professional marketing specialists. Unlike other CIT studies that interview likely service participants, this study must question a relatively elite group of respondents in order to illuminate the subject of post plan improvisation. Strategic marketing planners were targeted based on a behavioral interest corridor. An internal database of the world's leading provider of

business and marketing planning software was used to survey likely planners. The sample population consists of 15,000 marketing planning contacts that opted-in for future contact from the software company. The software company's products are sold online and in major retail outlets in the United States and Great Britain. Their name and logo were included in the recruitment e-mail. The study's academic purpose, a detailed explanation of the questionnaire and a hyperlink to the Qualtrics survey were also included in the e-mail. In addition to the warm introduction by the software company, a summary of the study's findings and a free, electronic, business toolkit were offered. This was expected to generate the desired number of responses and usable incidents of post plan improvisation. Based on previous CIT studies (Gremler 2004), 300 to 500 usable critical incidents should provide the number needed to systematically develop categories.

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\$10 Million or more	63	17%	
Age			17.25 (7)
<i>Planner</i>			
Education			
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Undergraduate Degree - Non Business	87	23%	
Undergraduate Degree - Business	101	27%	
Masters or Above	148	39%	
Skill Level			
Novice	14	4%	
Below Average	29	8%	
Average	135	35%	
Above Average	154	40%	
Expert	52	14%	
Experience (No. of Plans)			28.88 (10)
<i>Plan</i>			
Avg. No. of Components			4.78 (5)
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Duration of Plan Cycle			11.7 (12)
<i>Implementation</i>			
Deviation			
Never	0	0%	
Once	26	7%	
A Few Times	287	75%	
Very Often	71	18%	
<i>Reflective</i>			
Attribution			
Plan could have been prepared to handle situation	154	40%	
No amount of planning would have prepared to handle situat	229	60%	

Data Analysis Procedures/ Classification of Incidents

The analysis followed Edvardsson's (1992) use of a simple model of a critical incident in the service industry (Cause→ Course→ Result). He used this model to organize his interviews and subsequently to analyze and present the data. This study altered Edvardsson's model semantically (Cause→ Deviation→ Outcome) to match the context of this study. This study uses an incident of post plan improvisation as its unit of analysis. (See Figure 4.1.)

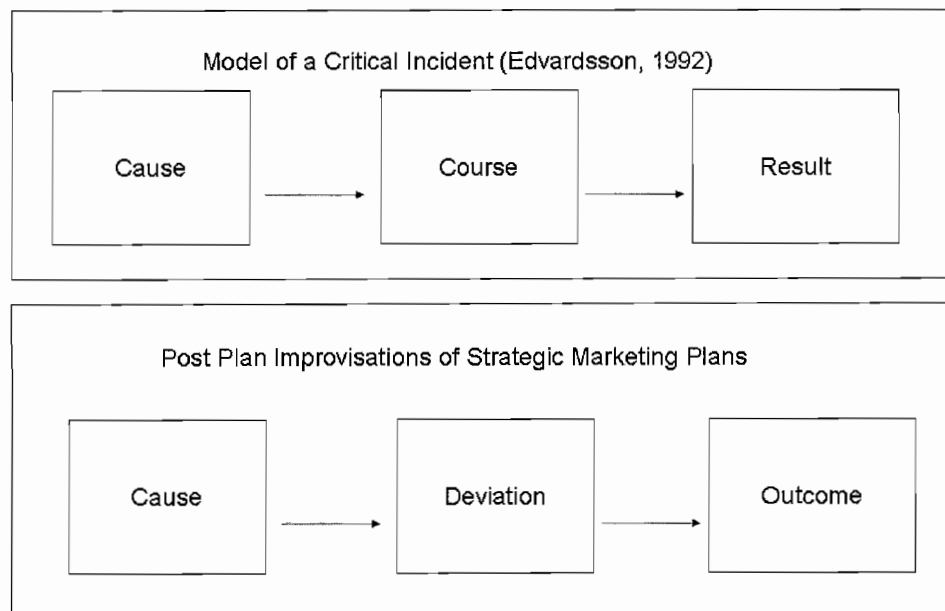


Figure 4.1 – Models of Critical Incidents and Post Plan Improvisations

Each incident of PPI is comprised of a cause, deviation and outcome. Each of the 415 usable critical incidents were examined for the presence of these three components. Only incidents that communicated a cause and a deviation were considered

complete responses and eligible for analysis. Outcomes were not required. During pretests it was discovered that a large percentage of respondents would not be able to report a single outcome due to incomplete information, poor metrics or mixed results. Responses that provided a cause and a deviation but no outcome were noted and are discussed in the next section.

The 415 usable incidents were divided into two halves. The first half (CI 1-208) was used for categorical development. The second half (CI 209-415) was set aside as a holdout sample. Five judges were used during the study. Judges A, B and C are doctoral students of marketing and management. Judges D and E are second year MBA students. Two judges (A and B) developed the initial categories and sorted the first half of incidents accordingly. Judges A and B conducted the arduous tasks of the primary reading, rereading and initial sorting of the incidents. This analytic induction process, as detailed by Bitner et. al (1990), required the judges to repeatedly review the incidents until patterns of similarities revealed extant groups and categories relevant to this study's underlying research question: What types of post plan improvisations exist? Judge A and B independently developed mutually exclusive and exhaustive categories for incidents 1-208. Four broad categories of causes, six categories of deviations and four categories of outcomes emerged from the initial process. The critical incidents were resorted and compared for their categorical consistency. Judges A & B worked to collectively define and document the categories. The incidents were resorted once again and compared for their categorical consistency. Judge C then independently sorted the incidents using this classification scheme. Each judge was trained by the principal

researcher and provided with explicit written instructions for reviewing incidents (see Appendix 1). Perreault and Leigh's (1989) reliability statistic (I_r) was computed as .88, exceeding the .857 average of critical incident studies reviewed by Gremler's (2004) meta analysis.

The second half of the critical incidents, the holdout sample, had the dual purposes of verifying the classification scheme and contributing towards understanding the phenomenon of PPI. Employing a holdout sample entails setting aside a portion of the incidents and using only the first set of incidents to establish the categories. Following Gremler's (2004) procedural recommendations, any use of a holdout sample is an unnecessary rarity and the large number of incidents used for a holdout sample in this study should improve the internal validity.

The two second year MBA students, Judges D and E were trained by the primary researcher and independently categorized the new incidents according to the categorization scheme developed by Judges A and B. Because of their inexperience in conducting social research and the sometimes cryptic nature of written responses generated from marketing planners of six different continents, Judges D and E independently coded each incident and then resolved their differences mutually before comparing their classification with the primary researcher, Judge A. The average interjudge reliability (I_r) was computed as .87 (see Table 5).

TABLE 4.2 - Interjudge Reliability (Perrault & Leigh, 1989)

							A	B	A X B	C ⁻⁵
Judges	Unit of Observation	Number of Categories (k)	Number of Observations (N)	Number of Agreements (F)	F/N	1/k	F/N -1/k	k/k-1	C	I _R
AB & C	Cause	4	199	165	0.83	0.25	0.58	1.33	0.77	0.88
	Deviation	6	199	159	0.80	0.17	0.63	1.20	0.76	0.87
	Outcome	4	199	171	0.86	0.25	0.61	1.33	0.81	0.90
Average I _R										0.88
DE & A	Cause	4	185	154	0.83	0.25	0.58	1.33	0.78	0.88
	Deviation	6	185	142	0.77	0.17	0.60	1.20	0.72	0.85
	Outcome	4	185	157	0.85	0.25	0.60	1.33	0.80	0.89
Average I _R										0.87

Method Bias Check

An additional step to the methodology was added to ensure that the online collection of data did not cause a problem. Accordingly, survey respondents were asked if they were willing to be contacted for further information. Approximately 100 survey respondents that agreed to be contacted were asked to participate in a follow up phone interview. This resulted in nineteen such interviews that reviewed their responses and probed for further clarity. Detailed notes were taken by the primary researcher and transcribed into electronic form immediately following the interview.

Coders A, B & C built the categorical classification and recoded the responses with all nineteen of the phone interview critical incidents based on their initial survey responses only. Coders D & E were given the original responses and the additional information captured in note form. Upon completion of the study the responses were compared to see if the additional information gained through the phone interview changed the categorical coding of the incidents.

Eight of the original nineteen surveys did not meet the study's requirements for inclusion because they did not provide enough information or the incident did not describe an incident of PPI. Five of these eight, when presented with their phone interview supplements, did meet the study's requirements for inclusion and were successfully coded by Coder D and E. This shows that the online methodology excludes potentially fruitful respondents. If time and manpower permitted, or the total database population were limited, follow up phone calls might be necessary to extract the amount

of responses necessary for elucidating the phenomenon. However, given the exploratory, theory building intentions of this study, this does not represent a theoretical or methodological problem.

Ten of the remaining eleven surveys that were coded by all five judges were consistently coded for their cause, deviation and outcome. One incident's cause was coded differently based on the additional information gained from the phone interview. The type of deviation and outcome remained the same. This response was not included in the final list of 384 CI's. As with most sociological studies, researchers are limited by the respondent's ability and willingness to provide accurate and detailed information. Given the exploratory nature of the study and intentions to build theory rather than generalize to larger populations, this limitation seems minor.

Results

Each incident of PPI was examined for three separate units of observation; causes, deviations and outcomes. This is consistent with Moorman and Miner's attempt to document both, "the incidence of improvisation and the factors that influence that incidence" (1998, p. 14). All 384 incidents included identifiable causes and deviations. Outcomes were not always provided. Critical incidents that did not include complete descriptions of their outcomes were not eliminated. Further explanation for this is provided in the section regarding the Categorical Development of Outcomes.

To ensure internal validity beyond using a holdout sample, explicit directions were provided to make sure saturation of the phenomenon was captured within the categories. Judges A, B and C used the first half of the incidents to create the categories.

Judges D and E were given explicit directions to look for any incidents that did not fit into the existing classification scheme. They were instructed to contact the primary researcher immediately if they were unable to place an incident into one category.

Judges D & E discovered some incidents that were eventually eliminated due to ambiguity but no incidents were identified that extended outside the existing categorical framework.

In the next three sections, explanations of the four main categories of causes, the six main categories of deviations and the four main groups of outcomes are detailed. At the end of each of the three categorical development sections a table summarizes the frequency statistics of each category and provides illustrative quotes from the critical incidents. (A full list of the 384 critical incidents is included in Appendix 2.)

Categorical Development of Causes

The first unit of observation discussed is causes. Four categories of causes of deviations from marketing plans emerged. They include: 1) Internal, 2) External – Market Forces, 3) External – Other Firms, and 4) External – Macro Environmental. Each is discussed in detail. (See Table 4.3)

1) Internal - Internally based causes of the deviations from marketing plans were coded 129 times, or 33.6% of the total number of incidents coded. The category, Internal Causes, represents a stimulus that originates inside of the firm. Examples of these incidents included human resource changes, internal relationship conflicts, new product development problems, resource constraints and errors attributed to the original plan or

incorrect analysis of information. Additionally, responses that attribute the deviations to internal motivation such as “we decided”, or “we changed directions”, without further explanation of another causal force, were coded as internally caused incidents.

2) External – Market Forces - The first of three external forces identified and discussed is market forces. These were coded 129 times, or 33.6% of the total number of incidents coded. The category, Market Forces, represents causes of deviations that originate outside of the firm from either specific customers or market opportunities. Examples of these incidents included explicit information from existing or potential customers as well as implicit interpretation of general market conditions. Sales results and corresponding information were also coded as a market forces. This category often described direct, first hand evidence or personal interactions from potential or existing customers that led to a deviation of their existing marketing plan.

3) External – Other Firms - The second external force comes from firms Other than customers. These were coded 89 times, or 23.2% of the total number of incidents coded. The category, Other Firms, represents competitors as well as suppliers and distributors. Examples of these incidents included competitors acting in a collaborative manner as well as incidents of supply chain partners acting in a competitive manner. Additionally, partners and alliances were included in this category.

4) External – Macro Environmental - The third, and final external cause of deviation, Macro Environmental were coded 37 times, or 9.6% of the total number of incidents coded. The category, Macro Environmental, included omnipotent forces such as exchange rates, commodities pricing, regulatory rulings, natural disasters and publicity

generated by third party media members without financial interest in the firm respondent. The size and scope of these forces were a distinguishing characteristic of this category.

Table 4.3 - Causes Summary

Deviations	Illustrative Quote	Frequency	Percentage
Internal	"Higher priorities within the corporation ended up consuming the entire available bandwidth of resources."	129	33.6%
External			
Market	"We deviated from our marketing plan when a client requested a different approach to providing our services."	129	33.6%
Other Firms	"A competitor offered a price reduction on virtually the same service we offered."	89	23.2%
Macro environmental	"Change in the sub-prime lending rate, market situation and the general economic mood changed the externalities of the business. This required changing the marketing strategy."	37	9.6%
		384	100%

Categorical Development of Deviations

The second unit of observation discussed is deviations. Six categories of deviations from marketing plans emerged. They include: 1) Product or Service Offering, 2) Price, 3) Promotion, 4) Target Markets, 5) Supply Chain, and 6) Marketing Management. Each is discussed in detail. (See Table 4.4.)

1) Product or Service Offering - Critical incidents that included deviation in product or service offering amounted to 70 or 18.2% of the total number of coded incidents. The category, Product or Service Offering, represents the value offered for exchange to customers. Examples of these incidents included the elimination of entire product lines or services, additions or deletions of product or service attributes and the

reconfiguration or bundling of products and services resulting in a new offering to the market.

2) Pricing - Deviations of price were coded 19 times or 4.9% of the total coded incidents. The category, Price, represents the quantity of payment or compensation required for exchange of the product or service offering. Examples of these incidents included both lowering and increasing prices.

3) Promotions - Deviations of promotions were coded 113 times or 29.4 % of the total number of coded incidents. The category, Promotions, represents the communication of information to potential customers. Examples of these incidents included changes in media outlets, elimination of planned media purchases, new promotional techniques and message adjustments. An increase or decrease in the amount of a promotional expenditure did not constitute a promotional change. Such changes were coded in the sixth category of deviations, Marketing Management.

4) Target Market - Deviations in target markets occurred 53 times, or 13.8 % of the total number of coded incidents. The category, Target Markets, represents the intended group of potential customers that the promotion and product offering are meant to entice. Examples of these incidents included changes in geographic, industrial, demographic, and psychographic targets. In some cases market scopes were expanded and in others they were reduced or eliminated all together.

5) Supply Chain - Deviations in supply chain occurred 15 times, or 3.9% of the total number of incidents coded. The category, Supply Chain, represents the network of resources needed to obtain and produce the product or service offering and deliver that

offering to the end customer. Examples of these incidents included the product delivery models, the addition or deletion of strategic partnerships and alliances towards the fulfillment of a supply chain related issue as well as changes in existing dealers and agents.

6) Marketing Management - Deviations in marketing management occurred 114 times, or 29.7 % of the total number of coded incidents. Marketing management represents the internal operations required to manage the marketing functions described in the previous five categories of deviation. Examples of these incidents included implementation issues, budget changes, schedule adjustments (both speeding up and slowing down of timelines), marketing personnel issues and other management tasks related to the execution of the marketing plan.

Table 4.4 - Deviations Summary

Deviations	Illustrative Quote	Frequency	Percentage
Product or Service Offering	"The sales and marketing departments were extremely over burdened by the constant changes to the products or services being offered. The company was significantly changed to the point of voiding the marketing plan within 3 months."	70	18.2%
Price	"We countered the advertising by discounting the product pricing lower than the advertised by the competition."	19	4.9%
Promotion	"Product lines took advantage of opportunities to promote the prior product prior to launch dates, in forums that were not included in our plan."	113	29.4%
Target Market	"The plan didn't take into account a recessionary situation in the city it was located in. More than 70% of the clients and revenue was from the same city, so the plan needed to be expanded to other geographic areas."	53	13.8%
Supply Chain	"As part of the marketing plan, we had made a decision to form a strategic alliance with another company to expedite the delivery of our product to the market...As the relationship progressed, it became clear that the pace in which they implemented the program was much slower than indicated and much, much slower than we were satisfied with.... We severed the relationship and we developed distribution channels of our own."	15	3.9%
Marketing Management	"We modified the initial implementation of this commercial market development program that all approach work and lead development would be conducted by the field marketing staff. Leads are forwarded to the sales team for closure."	114	29.7%
		384	100.0%

Categorical Development of Outcomes

The third and final unit of observation discussed is outcomes. Four categories of outcomes from deviations of marketing plans emerged. They include: 1) Successful, 2) Unsuccessful, 3) Mixed Results, and 4) Other. Each is discussed in detail. (See Table 4.5.)

1) Successful - Successful outcomes occurred 165 times or 43% of the total number of coded incidents. The category, Successful, represents a singularly positive

description resulting from the deviation from marketing plans. Examples of these incidents included improved financial performance, new or better deliverables, greater focus and management approval.

2) Unsuccessful - Unsuccessful outcomes occurred 52 times or 13.5% of the total number of coded incidents. The category, Unsuccessful, represents a singularly negative description resulting from the deviation from marketing plans. Examples of these incidents included decreased financial performance, poorly created deliverables, project or personnel termination and management disapproval.

3) Mixed Results - Outcomes with Mixed Results occurred 50 times, or 13% of the total number of coded incidents. The category, Mixed Results, represents an outcome that cannot be singularly coded as successful or unsuccessful. Instead, positive and negative elements are included. Examples of these incidents included successful outcomes with additional costs, labor, stress, delays or inconsistencies. They also included unsuccessful outcomes with potential for future benefits or some other redeeming quality such as learning.

4) Other - Outcomes that were indeterminable or absent occurred 117 times or 30.5% of the total number of coded incidents. The category, Other, represents different types of responses that do not fit into the three previous categories. They included well described, but unclear outcomes as well as missing data. The very nature of marketing and planning does not always lend itself to immediate impact or interpretation. Because of the open ended questions, missing data could be attributed to the simple fact that an answer is not yet possible. Many of these responses did have data related to the outcome

but indicated that enough time had not passed to assess the outcome or that it was too difficult to measure. Additionally, crosstab analysis of chi-squares is used later in an attempt to identify significant relationships among subgroups and different categories. Under reporting the outcomes could cause a difference of interpretation due to nonoccurrence (Howell 2002).

Table 4.5 - Outcome Summary

Outcomes	Illustrative Quote	Frequency	Percentage
Successful	"The change was quite successful. I estimate that we exceeded planned results by better than 22%."	165	43.0%
Unsuccessful	"The outcome was a project that generated less leads, causing less sales, and a lower gross profit and percentage to goal."	52	13.5%
Mixed Results	"The field marketing process has generated a number of commercial account leads for the sales team, but the level of production is less than half of our desired results."	50	13.0%
Other	"Not sure at this point. Some products are now ready and we have just started the marketing efforts, others are still in progress and thus marketing efforts are on hold."	117	30.5%
		384	100.0%

Additional Analysis of Internal Causes

A crosstab analysis pointed towards a statistically significant relationship between causes and deviations ($\chi^2 = 57.22$, $p < .000$) and causes and outcomes ($\chi^2 = 20.19$, $p < .017$). To better understand this important unit of observation, Causes were further coded for additional subgroups. (A complete presentation of the crosstab analysis is provided in this chapter, after the categorical descriptions.)

Four subcategories of internally caused deviations of marketing plans emerged. They include: 1) Failed Implementation and Planning Errors, 2) Financial, 3) Production and Design, and 4) Organization and Personnel. Each is discussed in detail.

1) Failed Implementation and Planning Errors - Failed Implementation and Planning Errors occurred 59 times, or 45.7% of the internally caused deviations (15.4% of total incidents). This category of internal causes represents problems created in the planning process through analysis or strategic design as well as the inability to follow through with the intended marketing plan. Examples of these incidents included misanalysis of existing information, insufficient effort in developing plans, and lack of execution of designed activities.

2) Financial Circumstances - Financial Circumstances occurred 28 times, or 21.7% of the internally caused deviations (7.3% of total incidents). The category, Financial Circumstances, represents financial resources related to the implementation of the marketing plan. Examples of these incidents included management's reallocation of financial resources to other departments, budget cuts and changes in expected revenues from investors or outside sources other than sales.

3) Production and Design - Production and Design occurred 10 times, or 7.8% of the internally caused deviations (2.6% of total incidents). The category, Production and Design, represents operational activities related to the creation of the product or service offering. Examples of these incidents included engineering delays and mistakes as well as new product development errors and miscommunications.

4) Organization and Personnel - Organization and Personnel occurred 32 times, or 24.8% of the internally caused deviations (8.3% of total incidents). The category, Organization and Personnel, represents management's design and direction as well as staffing. Examples of these incidents included hiring and firing personnel related to the marketing plan and its implementation, reorganization of the firm and personal and departmental conflicts or miscommunications.

Two subcategories of Other Firms externally causing deviations of marketing plans emerged. They include: 1) Competitive Forces, and 2) Suppliers, Vendors and Partners. Each is discussed in detail.

1) Competitive Forces – Competitive Forces occurred 35 times or 39% of the externally caused deviations stemming from other firms (9.1% of total incidents). The category, Competitive Forces, represents firms that offer services and products that the respondent considers a threat to their business. Examples of this included single firms, industry wide competition and indirect substitutes.

2) Suppliers, Vendors and Partners – Suppliers, Vendors and Partners occurred 54 times or 41% of the externally caused deviations resulting from other firms. The category, Suppliers, Vendors and Partners represents outside firms that provide inputs or deliver the respondent firm's output to the end customer. It also represents other firms that act in a non competitive way and includes strategic alliances and partners.

External causes of deviations from Market Forces and Macro Environmental were reviewed for potential subgroup development. Market Forces did have some natural differences in the specificity of language used to describe the cause. Either they

discussed issues from one customer or they talked vaguely about market forces in general. Although subgroups appeared possible, the differences appeared to be semantics and not fully categorized. Macro Environmental causes were also considered for further dissection of subgroups. However the number of incidents categorized as Macro Environmental (37) did not warrant further inspection.

The remaining two units of observation, deviations and outcomes were not further divided into subcategories. Deviations already has six main categories and further division would not provide meaningful analysis. Subcategories of outcomes were not considered necessary because of the inclusivity of the Other category and the relative focus of the other three main categories.

Crosstab Analysis

This section investigates the statistical relationship between categories in the data. Based on the categorical development, subgroups were compared using crosstab analysis for 15 of the descriptive variables captured by the survey and each of the three units of observation, cause, deviation, and outcome (43 total crosstabulations.). Table 9 includes the results for 12 significant relationships ($p < .1$) (With a p-value of .1 there is 10% chance of a Type I error, however 28% of the crosstabs were significant.). Further analysis and detailed information is provided for the four most clearly significant ($p < .01$) relationships. (With a p-value of .01 there is 1% chance of a Type I error, however 9% of the crosstabs were significant.).

Table 4.6 - Crosstab Analysis

Pearson Chi Square (p-value)			
	Cause	Deviation	Outcome
Post Plan Improvisation			
Cause		57.22 (.000)	20.19 (.017)
Deviation	57.22 (.000)		
Outcome	20.19 (.017)		
Firm			
Age	27.62 (.006)		
Location	49.49 (.014)		
Revenue			
Industry			
Planner			
Capacity	23.59 (.072)		
Education	28.32 (.057)		34.34 (.011)
MPSkill			29.41 (.003)
Plan			
Components			
Duration			
Focus		43.16 (.057)	
Pages	23.13 (.081)		
Deviante			27.36 (.000)
Attribution			6.38 (.096)

Reports the chi square value and significance of all results with $p < .1$

The cause of the deviation from the marketing plan resulted in the most number of significant relationships and included relationships with the other two units of observation, deviation ($\chi^2_{(15)} = 57.22, p < .000$) and outcome ($\chi^2_{(9)} = 20.19, p < .017$). This reinforces the value of understanding different types of post plan improvisations. The different causes of deviations from marketing plans has a relationship with the types of

deviations that occur and ultimately the outcomes of those deviations. Further detail about the relationship between cause and deviation is provided in Table 4.7.

Table 4.7 - Deviation * Cause Crosstabulation

			Cause				Total
			Internal	External - Market	External - Other Firms	External - Macro Environmental Forces	
Deviation Product	Count		22	22	18	8	70
	Expected Count		24	24	16	7	70
Price	Count		2	5	5	7	19
	Expected Count		6	6	4	2	19
Promotion	Count		33	42	32	6	113
	Expected Count		38	38	26	11	113
Target Market	Count		14	28	6	5	53
	Expected Count		18	18	12	5	53
Supply Chain	Count		2	3	9	1	15
	Expected Count		5	5	3	1	15
Marketing Management	Count		56	29	19	10	114
	Expected Count		38	38	26	11	114
Total	Count		129	129	89	37	384
	Expected Count		129	129	89	37	384

Five of the six types of Deviations have a 20% difference between the expected and actual counts for at least one of the types of causes. Price seems more likely to be caused from an External – Macro Environmental Forces and less likely to be related to an internal factor. Promotions appear more related to External – Other Firm and than External – Macro Environmental Forces.

Additional relationships exist between the cause of the deviation and the firm characteristics. Age is ($\chi^2_{(9)} = 27.62, p < .006$) significantly related to the cause of deviation. Further detail about the relationship between age and the cause of the deviation is provided in Table 4.8.

Table 4.8 - Categorical Age * Cause Crosstabulation

			Cause				Total
			Internal	External - Market	External - Other Firms	External - Macro Environmental Forces	
CatAge	< 5 Years	Count	41	50	29	13	133
		Expected Count	45	45	31	13	133
	5 to 10	Count	37	34	22	8	101
		Expected Count	34	34	23	10	101
	10 to 15	Count	3	15	6	4	28
		Expected Count	9	9	6	3	28
	15 to 20	Count	28	29	24	9	90
		Expected Count	30	30	21	9	90
	> 20 Years	Count	20	1	8	3	32
		Expected Count	11	11	7	3	32
Total		Count	129	129	89	37	384
		Expected Count	129	129	89	37	384

More middle aged firms (10-15 years) reported External –Market causes in deviation than expected and fewer internal causes in deviations than expected. Inversely, older firms (>20 years) reported Internal causes in deviation more than expected and fewer External – Market causes in deviation than expected.

Relationship between the planners and the cause of deviation also exist. The Capacity ($\chi^2_{(15)} = 23.59, p < .072$) in which the planner most typically spends their time (marketing vs. sales, finance, operations, or technology) affects the relationship with causes of deviation. This might reinforce the need for marketing specialists to be involved with the creations of marketing plans. Education ($\chi^2_{(21)} = 28.32, p < .057$) also shares a relationship with causes of deviation. Again, this might indicate a link between the level of a planner's education and the ability to improvise more successfully.

Characteristics of the plan itself only have one significant relationship with the cause of deviation. The plan's number of pages ($\chi^2_{(9)} = 23.13, p < .081$) is related to causes of deviation. The length of the plan is a simple but logical measure of plan

complexity. Given the likely correlation of plan complexity with age of the firm and education of the planner this warrants further consideration when studying PPI.

As mentioned earlier, the type of deviation is significantly related to the cause. Only one other measure has a significant relationship, focus ($\chi^2_{(25)} = 43.16, p < .057$). Depending on the plan's focus (one product vs. one service, multiple products/services or firm wide plan) the type of deviation is related. Supply chain and promotional deviations appear to be influenced by the plan's focus.

In addition to the relation of outcome to causes, outcome is related to four other variables. The self reported Marketing Planning Skill Level had a significant relationship with outcome ($\chi^2_{(12)} = 29.41, p < .003$). Further detail about the relationship between outcome Marketing Planning Skill Level is provided in Table 4.8.

Table 4.8 - Outcome * MPSkill Crosstabulation

			MPSkill					Total
			Novice	Below Average	Average	Above Average	Expert	
Outcome Successful	Count		3	4	59	68	31	165
	Expected Count		6	12	58	66	22	165
Unsuccessful	Count		5	8	15	19	5	52
	Expected Count		2	4	18	21	7	52
Mixed Results	Count		4	5	19	17	5	50
	Expected Count		2	4	18	20	7	50
Other	Count		2	12	42	50	11	117
	Expected Count		4	9	41	47	16	117
Total	Count		14	29	135	154	52	384
	Expected Count		14	29	135	154	52	384

An interesting relationship exists between the marketing planners self reported skill level and their choice of incident valence. Novice and Below Average planners were less

likely to report a successful outcome from a deviation of their marketing plan, and Experts were more likely to report successful outcomes.

Attribution ($\chi^2_{(3)} = 23.13, p < .081$) of the planning process's ability is related to outcomes. Attribution refers to the planner's assessment of whether the planning process could have been used more effectively to avoid deviating in the first place. Given the high amount of successful outcomes, this relationship might not be valid. Although the fact that education ($\chi^2_{(20)} = 23.13, p < .081$) and marketing planning skill level are also related to the outcome, this could be due to a bias from expectations and egos.

The last relationship is between the outcome and frequency of deviating ($\chi^2_{(6)} = 27.36, p < .000$) from the plan. Further detail about the relationship between outcome and frequency of deviating is provided in Table 4.10.

Table 4.10 - Outcome * Deviate Crosstabulation

			Deviate			
			Once	Few Times	Very Often	Total
Outcome	Successful	Count	11	135	19	165
		Expected Count	11	123	31	165
	Unsuccessful	Count	3	27	22	52
		Expected Count	4	39	10	52
	Mixed Results	Count	2	41	7	50
		Expected Count	3	37	9	50
	Other	Count	10	84	23	117
		Expected Count	8	87	22	117
Total		Count	26	287	71	384
		Expected Count	26	287	71	384

Firms that reported successful outcomes from deviations of their marketing plans were less likely to deviate very often. Inversely, the firms that deviated very often were more likely to have reported an unsuccessful outcome.

CHAPTER V

DISCUSSION

Overview

This chapter presents a discussion of the key findings and major contributions from this study. First, the three categories that emerged from the units of observation are discussed. Each category is inspected for interesting or unexpected findings and further explained. Next, the results of this study are reviewed for their connections to existing theory of organizational improvisation. Important methodological and managerial contributions follow. Finally, limitations of this study and future research opportunities are discussed.

Theoretical Contribution

The principal theoretical contribution of this study is the categorical development produced and presented in the results section of this dissertation. For the first time, empirical evidence dissects the different types of post plan improvisation. Figure 5.1 is a model of post plan improvisation based on the categorical findings. This model increases the detailed understanding of the construct for post plan improvisation of strategic marketing plans. Until now, measures of improvisation and post plan improvisation were

general measures that assumed different types of improvisation to be inherently equal. This study does not prove this fact incorrect but it illuminates the depth of the phenomenon, and given its complexity, suggests that there might be a reason to look deeper before making such assumptions.

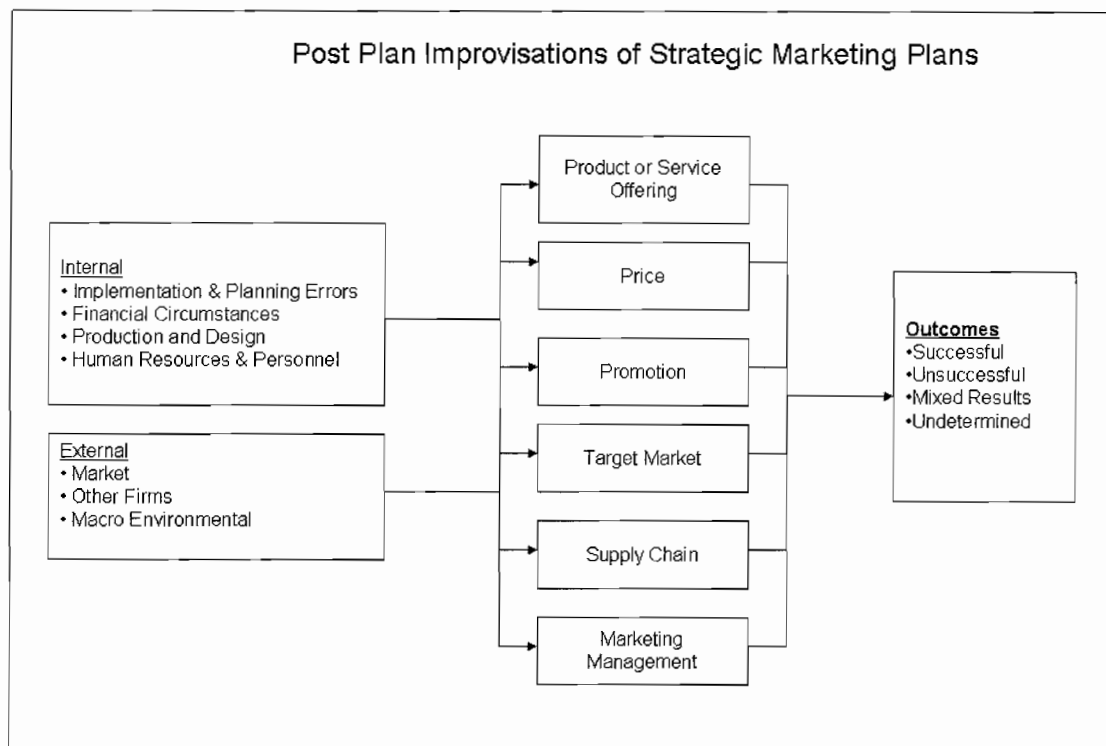


Figure 5.1 – Model of Post Plan Improvisations of Strategic Marketing Plans

Categorical Discussion of Causes

The first unit of observation is the cause of deviation. Four categories were initially identified: Internal, External – Market Forces, External – Other Firms and External – Macro Environmental Forces. Additional analysis led to the creation of

additional subgroups for the Internal and External – Market Forces categories. Each of these categories are discussed in this section.

Internal causes for deviation ranged from the whimsical, “we wanted to try direct mail, which was an unbudgeted item (CI – 202),” to the concrete, “the company changed (reduced by 20%) the amount of the budget dedicated to marketing (CI-613).” (Note: A full list of the critical incidents (CI-#) can be found in the Appendix.) All of these incidents were based on causes from inside the firm. The additional subcategories for this category included Failed Implementation and Planning Errors, Financial Circumstances, Production and Design, and Organization and Personnel. Three of these subcategories involve finances and personnel. These resources are consistent sources of competitive advantage for firms and are consistent subjects of research by strategic scholars. Additional collaboration between marketing and management researchers could be beneficial to understanding these causes in more detail. The Production and Design subcategory relates closely to innovation research. Although the innovation literature is immense, these results could lead to fruitful potential for both innovation and planning research.

The External – Market Forces category varied in levels of detail. Many of the responses provided general analysis like, “resistance due to existing market dynamics (CI -153),” or, “due to market conditions (CI-245).” Others gave much more specific stories such as, “our largest customer became impossible to satisfy (CI-265),” or “pressured by clients (CI-489).” Sales reports and quantifiable measures were often mentioned in this

category. Examples included, “we were only getting responses from our e-mail campaign (CI-699),” or “no business from my target area (CI-713).”

The External – Other Firms category was further divided into subcategories that included Competitive Firms and Suppliers, Vendors and Partners. Competitors were usually explicitly identified such as, “competitor launched a new product earlier than anticipated (CI-120),” or “a competitor offered a price reduction (CI-360).” Suppliers, Vendors and Partners were not always as obvious. Companies identified as the cause such as, “changed focus from Japanese service provider (CI-410),” had to be considered in the context of the entire response. Later it was revealed that, “we went directly to business customers of service provider.”

Finally, The External – Macro Environmental Forces category was broad but still clearly connected as larger forces affecting many firms. The responses included, “change in the sub prime market rate (CI-251),” to “an energy crisis (CI-236),” in Albania. Large regulatory agencies such as the American Heart Association and government interactions were also named in these responses.

Understanding the causes of deviation from marketing plans could provide the foundation for new situational analysis techniques. During the situational analysis, planners attempt to use marketing research to evaluate the internal and external environment in order to set objectives congruent with long-term goals of the organization. If the taxonomy of post plan improvisations leads to research that can better predict which types of improvisations lead to successful outcomes, the causal

forces that lead to an incidence of improvisation can be better targeted during the situational analysis.

This study found that there were two subcategories of External – Other Firms categories: Competitive Forces and Suppliers, Vendors and Partners. During the coding process special attention had to be given in order to subdivide this category. In accord with Achrol and Kotler's (1999) realization that marketing in a networked economy requires a paradigm shift, market planners must recognize that environmental analysis has become more complex. In this study, the role of other firms often seems multifaceted. Some competitors offered assistance and some partners signaled hostile intentions. Traditional marketing planning outlines (Kotler 2007) over simplify the competitive analysis. Market planners must consider the leverage of each relationship for the potential to cause a deviation from the marketing plan. By looking at the potential for change relative to the leveraged size and impact of the other firm, regardless if they are a competitor or ally, could lead to more preparedness.

Categorical Discussion of Deviations

The second unit of observation is the deviation. Six categories emerged: Product or Service Offering, Price, Promotion, Target Market, Supply Chain and Media Management. Each of these categories are discussed in this section.

Deviations to the product or service offering were usually explicit. Responses included direct statements such as, "New product offering...expanded products (CI-267)," and "the focus of the services shifted (CI-460)." This category represents a

change in the perceived market offering, not necessarily a physical change. For example, one respondent said, “the client ordered a service that was a stand alone service...only meant to be offered as an additional service to a package. We had to honor the client request (CI-176).”

Pricing deviations were also straightforward. Respondents indicate they made, “reduction in price (CI-588),” and “changed pricing strategy (CI-420).” This category was the most obtuse of the deviation categories. The language was matter-of-fact in tone.

The category for promotional deviations contained more animated and varied responses. These responses included changes in media buys such as, “I purchased air time on a radio station (did not refer to my advertising costs in the marketing plan)(CI-476).” They also included diverted media expenditures such as, “we slashed the coverage area for yellow pages advertising and diverted the funds to other media including local internet directories (CI-318).” Message changes were included in the promotional deviations category. Examples of these included, “we refocused the message using different terminology (CI-429),” or more specific examples like, “we improved upon the text in the marketing letter (CI-491).” Direct sales was a form of promotion that appeared frequently. Responses included, “we have moved to a direct sales approach (CI-677),” and another added, “changed the focus to be more sales driven (CI-673).”

The fourth category of deviations is Target Markets. General statements included, “had to refocus the target (CI-109),” and “the target market was not responsive so we changed markets (CI-201).” Geographic deviations were addressed such as, “that

required us to reevaluate the corporate marketing plan and evaluate foreign markets (CI-422).” More specifically, one respondent identified their geographic target changes by stating, “We had placed too much priority on North America and Europe. Decided to change that priority to South-East and South Asia area (CI-433).” Industrial target market deviations were included. One respondent expanded his focus and, “networked with the medical industry – not something I had thought about (CI-399).” Changes in target markets included added attention to existing customers. One respondent noted, “I had to deviate from my prospecting focus to current customer needs (CI-17).”

Deviations of supply chain are the fifth category. Delivering the product offering in different ways included changes in, “selling online (CI-529),” and establishing, “channel partners that focused in this space (CI-141).” Responses ranged from efficiency desires such as, “a strategic alliance with another company to expedite the delivery of our product to the market (CI-387),” to deviations intended to improve penetration. One respondent shared, “We were having trouble breaking into Ireland as we didn’t have a sales force on the ground there. In the end we made an agreement with the Irish company that they would have exclusive distribution rights for Ireland (CI-213).”

Finally, the sixth category of deviation is Marketing Management. There was a large range of responses. Additions or deletions of marketing manpower included, “we found a Chief Marketing Officer (CI-41),” and “the key contact had to change (CI-150).” Budget changes of marketing plans were also noted. Responses included, “a budget was changed due to cuts in specific programs (CI-45),” and “I budgeted way to little....I upped the budget in accordance to what I spent (CI-478).” Timing played a big role in

this category. “Simple production delays (CI-270),” were the deviation for one respondent. Another respondent stated, “web development had to be delayed by up to a year (CI-310).” Not all responses were negative cuts to budget or delays. One example includes, “when ROI was better than anticipated, increased budget for better performing campaigns (CI-194).”

The Marketing Management deviations include delays. Although they also include incidents of increased speed, most often incidents regarding temporal adjustments of the implementation schedule were delays. During the initial screening of incidents to determine which respondent’s incidents to include, delays were set aside and not included. Further review of the responses showed that delays were a frequent and important portion of what later became the Marketing Management category. The responses included many stories of delays that led to serious consequences.

The role of time and organizational improvisation is an extremely important conversation (Crossan et al. 2005). Temporal impact of improvisation was first emphasized as a measure of the degree of improvisation (Moorman and Miner 1998). Crossan et al. (2005) believe that time has been oversimplified in consideration to improvisation. They develop a conceptual model with scenarios of improvisations in Organizations (see Figure 5.2).

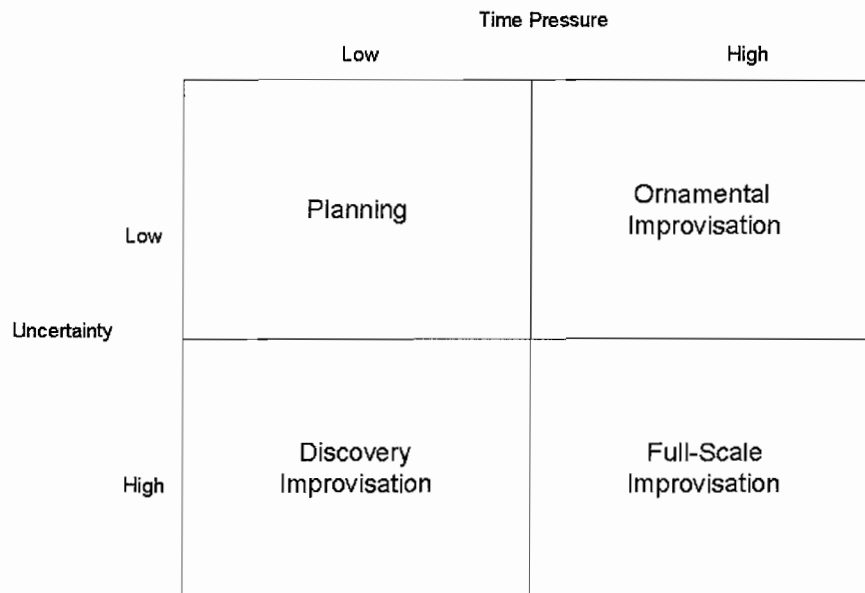


Figure 5.2 - Scenarios of Improvisations in Organizations (Crossan et al. 2005)

The figure indicates that in times of low uncertainty and low time pressure, traditional design-precedes-execution planning is sufficient. Otherwise, some level of improvisation is likely to occur. Unfortunately, assessments of uncertainty and time pressure are relative to the organization and therefore should not be generalized.

Market planners must assess their own time pressures and levels of uncertainty. Borrowing from biology, phase entrainment is the synchronization of cycles (Ancona and Chong 1996). Marketing planners should consider their environment and the improvement or disruption to entraining their marketing efforts to their relative cycles before they consider delaying or speeding up their programs. The frequency of marketing management delays and their impact to improvisation and planning suggests

that temporal consideration play a more prominent role in developing the situational analysis and in managing the deviation from plan.

Categorical Discussion of Outcomes

The third unit of observation is the outcome. Four categories emerged: Successful, Unsuccessful, Mixed Results and Other. Each of these categories are discussed in this section.

Successful outcomes were frequent and explicit. Examples included, “highly successful...it lead to a long term services contract (CI-82),” and “very successful and increased revenue 20% (CI-119).” Many of the responses indicated that their response was linked to specific marketing objectives. One respondent stated, “our sales recovered well...the competitor has since left the area (CI-93).” Specific metrics were mentioned by some respondents. Examples of these include, “we have a committed contract for \$300,000 a year (CI-225),” and “we were able to open up 300 new checking accounts (CI-323).”

Unsuccessful outcomes were not as frequent but just as explicit. Examples included, “it was unsuccessful mainly because the media outlet failed me (CI-59),” and “our objectives were not achieved (CI-246).” One respondent stated, “our plan got an eight month delay and we haven’t achieved the original goal (CI-241).” Some responses in the category did not make an evaluation but the story they provide can only be categorized as negative. For example, a respondent stated, “we had to attend two exhibitions without the brochure. We produced a makeshift write-up of our services and

printed several copies on A4 paper and used this as a substitute. Needless to say this was not up to scratch, there were no pictures (CI-305).”

Outcomes included in the Mixed Results section indicated positive and negative ramifications resulting from the deviation. Examples included, “successful but delayed launch (CI-12),” and “good segment penetration with this strategy...but unknown lost opportunity from reduced support on other strategies (CI-57).” The complexity of determining outcomes is reflected in the emergence of this category. One respondent stated, “we were successful in the area we shifted investment to, unsuccessful in our plan for areas where budget was removed (CI-392).” Another respondent added, “This approach proved that this new target market was valid because we closed a number of new accounts. However, the volume of business was much less than we hoped because there was no field sales contribution to creating new opportunities (CI-456).”

A final category, Other, captured the remaining responses. Due to the relatively large number of responses that did not provide any indication for the outcome of the deviation even though they were expressly asked to do so, there was no need to further dissect this category beyond the previous three categories. Besides non responses, examples of responses that ended up classified as Other include indeterminable responses like, “I am not sure if it was successful or unsuccessful (CI-4),” and “it is hard to say, healthcare is a very hard industry to do ROI (CI-39).” Others responses specifically cited that enough time had not passed to make a determination of outcome. One respondent stated, “too early to determine (CI-23),” and another added, “early days but it looks promising (CI-30).”

Previous studies have conceptually posited the existence of positive and negative outcomes (Pina e Cunha et al. 2003). This study's outcomes include Mixed Results and Other categories. This provides an interesting basis for considering the nexus of planning, organizational learning and improvisation. Marketing planning, "is the logical sequence of activities which leads to the setting of marketing objectives and the formulation of plans to achieve them" (McDonald 1989, p. 2). As marketing planning research has evolved, implementation has become interwoven into planning and traditional Design-Precede-Execute (DPE) concepts have been replaced with an integrated perspective. Part of this perspective must include improvisation, the extemporaneous creation and execution of action. Also, the process of planning has become a mechanism for designing and managing learning and thus the organizational learning literature must also be included.

The literature on organizational learning described the two most distinct types of learning: single and double loop learning (Argyris 1976). From a marketing planning perspective, single loop learning occurs when errors are detected and corrected in accordance with the plans objectives. Single loop learning does not question underlying beliefs or assumptions. Positive and negative outcomes of post plan improvisations provide the necessary information to support a unique phenomenon of single loop learning specifically tied to the marketing planning process.

Double loop learning requires more introspective attention. Beyond detecting and correcting errors, double loop learning requires the reevaluation of existing norms and procedures that led to the error. In the case of post plan improvisation, double loop

learning must also consider the Mixed Results and Other outcomes. The situational analysis assesses information at predetermined points (either temporally or event based). Incomplete, indeterminable and mixed results are difficult to assess. As organizations reconcile their previous planning efforts they need to take into consideration resolved outcomes (positive and negative) and unresolved outcomes (Mixed Results and Other) that have resulted from PPI. For incomplete or indeterminable results, this might require that special metrics or assignments are dedicated to assessing these results at a later time (single loop learning challenge) and that the marketing planning process itself led to incomplete or indeterminable results (double loop learning challenge). Strategic design of a planning process sensitive enough to consider the source of such results would suggest an example of double-loop learning (Argyris 1978). If the firm is able to manage both single loop and double loop learning this would constitute duetero-learning, a higher order level of organizational learning.

Brews and Hunt (1999) showed greater support for the planning performance link but noted that the value of incrementalism and learning should not be completely discounted. They linked planning and learning together and began to bridge the theoretical silos among some management scholars. These results could signal the location of a fruitful area to investigate in order to continue to fuse the learning and planning research specialties.

Dodgson (1993) points out that learning can occur distinctly in different functions of the organization including marketing. Therefore, strategic marketing planning can encapsulate its own level of organizational learning separate from that of the organization

as a whole. Even more specifically, the awareness and management of PPI might create a unique competency that could create a competitive advantage among firms.

Crosstabs Analysis Discussion

It is important to remember the limitations of this study before discussing statistical differences of groups and subgroups. This methodology is not meant to be generalizable. The analysis is limited to the data that has been collected. Additional studies are needed that consider sample selection and distribution before any conclusions can be inferred to larger populations. The crosstab analysis does provide a fruitful area to probe more deeply. Discussions regarding each of the four crosstabs analyses for the most significant results ($p < .05$) follow and are depicted by the dashed arrows in Figure 5.3.

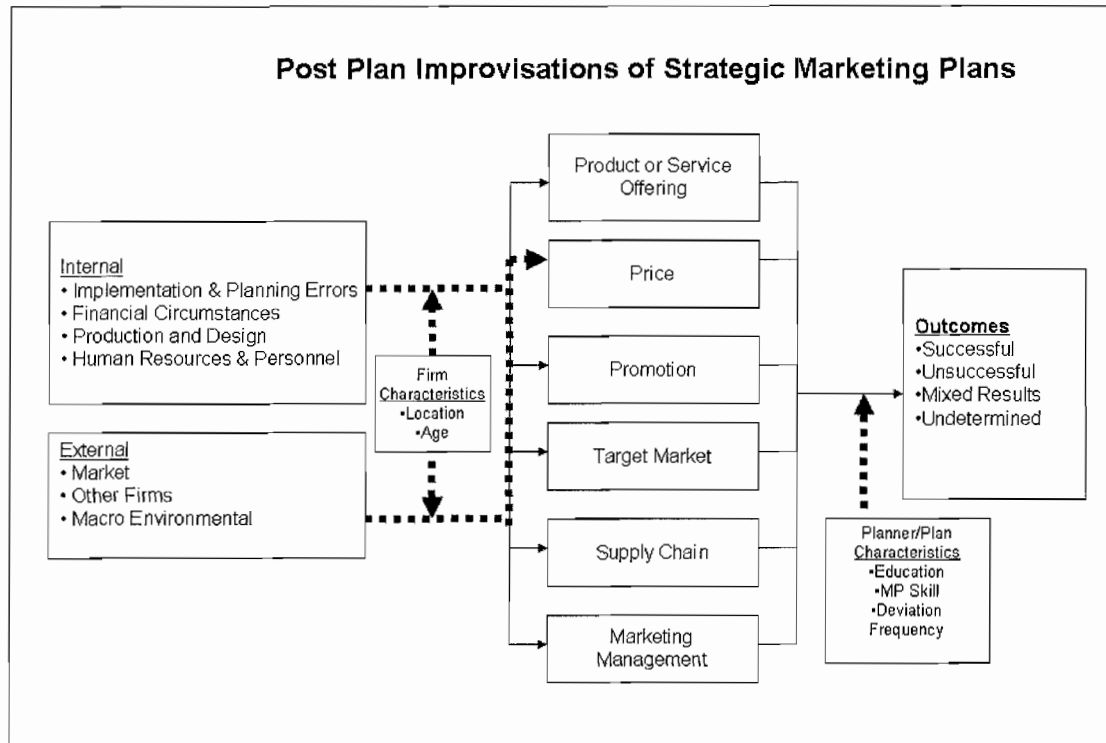


Figure 5.3 - Crosstab Analysis with Unexpected Frequencies ($p < .05$)

There was a significant amount of unexpected frequency between the cause of deviation and the type of deviation. Specifically, price was more frequently observed in the External – Macro Environmental forces than the External –Market Forces or Internal categories. This suggests that firms that are particularly vulnerable to price fluctuations should invest extra time in researching macroeconomic issues or build in related contingencies. Additionally, deviations involving Target Markets are particularly sensitive to External - Market Forces. Although this shows an increased and somewhat expected relationship, Target Market deviations based on Market forces does not indicate a link to successful outcome. Firms should expect the temptation or invitation to adjust

their market focus to come from what they learn from their customers. Another logical relationship is between the additional deviations of supply chains caused by other firms. Perhaps the causal forces that are under represented should be examined more closely. Finally, the largest difference in expected and actual counts comes from the number of marketing management deviations stemming from internal causes. Again, logical, but perhaps this type of deviation is most often overlooked. Marketing's external focus might make internally driven deviations to the marketing management function even more pronounced.

There was a significant amount of unexpected frequency between the cause of deviation and the age of the firm. Specifically, 10 to 15 year firms are more likely to be related to External – Market Forces than Internal forces. This suggests that as firms get older they need to be more aware of internal causes of deviation to their marketing plans. Additionally, the lack of External – Market causes should be a concern. This could be due to older firms understanding their customers and markets better than young and middle age firms or it could be a lack of communication that could cause deviations with successful outcomes. Additionally, location ($\chi^2 = 49.49$ $p < .014$) demonstrated a significant amount of unexpected frequency within the type of cause of deviation. This indicates that marketing planners also have to be aware of geographic and cultural specifics.

There was a significant amount of unexpected frequency between the outcome and the respondent's perceived level of marketing planning skill. Specifically, Novice and Below Average planners were less likely to report a successful outcome from a

deviation of their marketing plan and Experts were more likely to report successful outcomes. Vanity could be part of the explanation. Planners that consider themselves experts might also want to justify ranking themselves as such by reporting a positive story. Interestingly, if they are expert planners, they should be better at projecting their environments and correlated strategy and less likely to need to deviate.

Finally, there was a significant amount of unexpected frequency between the outcome of the deviation and the frequency of deviations made. Specifically, firms that reported successful outcomes from deviations of their marketing plans were less likely to deviate very often. Inversely, the firms that deviated very often were more likely to have reported an unsuccessful outcome. This does not suggest that firms that deviate very often have fewer successful outcomes and more unsuccessful outcomes than other firms. It does suggest that the firms that indicated they deviated more frequently were more likely to report an unsuccessful incident and less likely to report a successful incident. It does indicate that the companies with salient success stories are more likely to have deviated a few times and not just once or very often.

By looking more closely at the crosstab analysis of the four most significant areas containing unexpected frequencies, it would appear that firms that are the most rigid or most flexible are less likely to successfully deviate from their marketing plan. This supports previous literature on the value (Moorman & Miner 1998) and paradoxical nature (Slotegraaf and Dickson 2004) of improvisation. It might also suggest that there is more to improvisation than the extent or frequency and a more fine tuned understanding of the different types of post plan improvisation is needed.

Methodological Contributions

The use of the CIT in marketing research, outside of service research, has rarely been attempted. This study could reintroduce this method to marketing scholars and students. As detailed in the methodology chapter, there are unique benefits to the CIT. It should serve as a reminder that too much deduction can increase the gap between scholastics and practitioners. Inductive techniques such as the CIT refresh the literature base with new, practitioner directed information to help maintain research currency and credibility.

The few quantitative improvisation studies collect data from a relatively few number of firms. The number of firms used to create the categories of post plan improvisation (N=384) represents one of the largest pools of firm respondents documented in CIT studies used for marketing research. Moorman and Miner (1998a) documented multiple improvisational acts of new product teams from two forms. They admit the danger of methodological bias in their study and suggest that future research, “could involve considering a more comprehensive study of improvisation that extends the connections between information and improvisation (p. 14). Vera and Crossan (2002) looked at 38 teams in one firm. They recognize the lack of power with their statistical findings and note the subsequent risk of creating a Type II error (accepting the null hypothesis when it should be rejected).

Managerial Contributions

Of the respondents that completed a marketing plan in the previous eighteen months and attempted to implement that plan, 92% of them deviated from that plan. The frequency with which these firms improvise from their approved marketing plans is remarkable. Any insights that can help managers better identify which types of deviations are more likely to lead to successful outcomes will have a huge impact on managerial marketing. This study takes the important first step of identifying the actual post plan improvisations made by marketing planners. This will allow future researchers to more specifically identify which deviations benefit which types of firms.

Managers should be aware that a large percentage of post plan improvisations are caused by internal forces. The literature to this point focuses on external analysis of the environment during marketing planning. Additional insights should be sought regarding how to train marketing planners to better analyze and plan for internal disruptions. This might constitute a new section of the situational analysis section of plans. It should also be considered in contingency planning phases as well.

Important consideration should be allocated towards deviations in marketing management. Much like internal causes, these types of post plan improvisations are underreported and warrant specific marketing management techniques for identifying and maximizing adjustments to this area.

Finally, managers should understand that there needs to be special attention to specific outcomes related to deviations from marketing planning. This will empower them to learn which types of causes and deviations are beneficial for their specific firm

and industry. This study points out the difficulty of measuring and reporting marketing implementation effects because of their integrated nature and possible long-term orientation.

Limitations

There are limitations to this study. The first limitations involves the source of data. By asking firms from the same database for information there is a possibility that firms not represented in that database are not part of the creation of the new categories. These firms have online capabilities (based on their participation) and seemingly support the idea of formal written plans (based on the software's connection.) This study used a logical behavioral corridor to access an elite audience. Because the findings of this study are not meant to be generalizable to any population, these effects should be minimal. Future research in this area should look for other sources of information that include respondents from larger businesses and planners that utilize other means of planning.

Additionally, the critical incidents were reported from a single respondent based on a retrospective interpretation of actual events. The measurement of the phenomenon is limited to the respondent's memory. Although memory constraints are noted as a general limitation with all CIT studies (Chelle 1998), previous service-based research usually focuses on events that are less complex than post plan improvisations. This should be considered in the development of future results. However, retrospective reports in organizational research have been shown to be an acceptable means of

generating data if the measure used to generate the reports is adequately reliable and valid (Miller et al. 1997).

The second major limitation of this study is the collection of open ended, exploratory data through an online method. There is a risk that valuable and new data is not captured because the researcher does not have the ability to reactively probe the respondent based on incomplete or vague answers. Given the large amount of responses that were discarded, this concern is warranted. However, every study must make concessions for completing the research in a timely and cost sensitive manner.

Future Research

By inductively augmenting the knowledge base of organizational improvisation, more detailed, deductive research will be possible. The next obvious step is to study the phenomenon of post plan improvisation with traditional deductive research. Existing literature regarding organizational improvisation should consider if all PPI categories are theoretically consistent. Recently, Dennis and Macaulay (2007) argued that improvisation is a key element for achieving a market orientation. This study typifies the use of more precise knowledge about improvisation in future research. The results of this study show that firms improvise based on external and internal causes. Do internally and externally caused deviations of marketing plans both affect market orientation? Given the external focus of market orientation, internally caused deviations may not affect a market orientation. Only externally caused post plan improvisations increase a firm's market orientation. Although this study itself does not yet provide a litany of direction for

managers there are some insights. The recognition of internally caused deviations reminds planners that their situational environment must also account for intrafirm turbulence as well.

Improvisational research can be messy. In the past, researchers have identified complexity theory as a useful lens for explaining and predicting improvisations. (Crossan et al. 2005; Pina e Cunha et al. 1999; Weick 1998). Complexity theory explains how organizations adapt to their environment. Organizations are a series of strategies and structures that are susceptible to more complex, external factors. Small environmental variations can produce extraordinary variation within the organization. The theory attempts to explain how complex organizations exhibit non-linear behavior which leads to unpredictable behavior and rapid rates of change (Anderson 1999). Further research should continue to look towards complexity theory for insights.

Conclusion

Organizational improvisation has been empirically linked to new product and process outcomes (Moorman & Miner 1998), relative brand equity (Slotegraaf & Dickson, 2004) and innovation (Vera & Crossan, 2005). Given the importance of these concepts, it would suggest that more attention should be devoted to understanding when to improvise and when not to. Until now, improvisation types have not been fully identified. This study bolsters the understanding of the phenomenon and provides future researchers with the ability to more deeply probe into post plan improvisations of strategic marketing plans.

APPENDIX A

CODING INSTRUCTIONS AND RECRUITMENT DOCUMENT

Overview

1. You will be provided with a set of incidents regarding marketing planning and post plan improvisation. Respondents that indicated that they had completed a marketing plan within the past eighteen months and been involved in its implementation were asked a series of three questions intended to elucidate an event where they deviated from that marketing plan during its implementation.
2. You will be asked to categorize each incident into all 3 different categories:
 - A) identify a specific deviation from their marketing plan.
 - B) identify the cause of that deviation
 - C) if possible, identify the outcome from that deviation
3. You should read through all of the respondent's text before you begin to classify the incident. If the incident does not appear to fit into any of the 3 categories, put it aside. Do not attempt to categorize incidents that do not meet the basic criteria. An incident must: (A) represent a specific deviation from a marketing plan (B) provide a cause for that deviation. Incidents without specific outcomes are expected and a category for no response is available.

Coding Rules

“Each incident should be categorized within one category only. Once you have read the incident, you should begin asking the following questions in order to determine the appropriate category” (Bitner et al.1994, p. 104).

(Presented to coders online using Qualtrics Software)

Please write a brief summary of the critical incident mentioned above and attempt to identify the following 3 things:

1. The cause of the deviation from the marketing plan
2. The deviation that occurs
3. The outcome

NOTE: All three might not be available in every incident.

Based on your understanding of the incident you just summarized which of the following categories best describes THE CAUSE OF THE DEVIATION FROM THE MARKETING PLAN?

- Internal Causes - (i.e. New Product Development Delays, Management Change, Decide to go in a different direction)
- External Causes - Customers/Your Market (i.e Sales are disappointing, Added a New Client)
- External Causes - Other Firms (i.e. competitors, supply chain partners)
- External Causes - Macroenvironmental Forces (Government, Legal, Technology, Economic)
- None of the Above

Based on the same incident which of the following categories best describes THE DEVIATION THAT OCCURRED.

- Product or Service Offering
- Price
- Promotion (i.e. New or Different Media Choices, Change of Message)
- Target Market
- Supply Chain (i.e. New Distributor)
- Marketing Management (i.e. Personnel, Finance and Budget Changes, Delays or Timing Changes)
- None of the Above

Base on the same incident which of the following categories best describes THE OUTCOME.

- Successful
- Unsuccessful
- Mixed Results (i.e. In the end we were successful but it cost more than we expected)
- Other

Training Causal Subcategories

(Note: Presented to a single coder in an additional round of coding. Presented on paper.)

A. Internal

1. Failed Implementation & Planner Errors

- not following through on planned activities for explained reasons (i.e., we changed our mind and never followed through)

- unexplained reasons (i.e., we failed to follow through with the plan)
 - changes to the strategy or plan because of new information that could have been identified in the original planning stages (i.e., capabilities of the organization were not as broad as we believed, or, due to planning errors).
2. Financial Circumstances occurred include
 - management's reallocation of financial resources
 - budget cuts
 - investment changes.
 3. New Product Development includes
 - specific identification of product development and engineering influences
 - Production delays
 - Note: The introduction of new product not included in the original plan would
Instead type of incident would be coded as a failed implementation or planning error.*
 4. Human Resources includes
 - change in management
 - personnel conflicts
 - communication failures
 5. Other
 - Anything that does not fit into the previous categories

B. External – Other Firms

1. Competitive Forces includes
 - direct or indirect competition
2. Suppliers, Vendor and Partners
 - includes observations of upstream and downstream supply chain partners
 - other firms that act in the form of an alliance or partnership.
3. Other
 - Anything that does not fit into the previous categories

Recruitment Document:

Palo Alto Software will send an e-mail with the following information:

Subject: Complete this survey and receive a Business Resource Toolkit

Body: We want to know more about your marketing planning and implementation. To participate in an academic research study sponsored by Palo Alto Software on behalf of University of Oregon doctoral student, Pete Whalen, please complete the online questionnaire. Simply click on the link below. The survey should not take more than 10 minutes to complete. Upon completion, you will receive Palo Alto's "Grow Your Business" – Resource Kit including:

- Over 60 sample plans
- 7 business calculators
- Two planning tutorials
- 20% Discount off of Business Plan Pro

SURVEY LINK goes here

The purpose of this study is to understand how marketers implement their marketing plans. Your answers will be completely confidential and reports from the survey will be made available to those who choose to participate.

Thank you in advance for your consideration.

APPENDIX B
SURVEY RESPONSES

CI # - 1) Answer to: Please consider one occasion where you deviated from your marketing plan. Describe the circumstances leading up to the incident. Please provide as much detail as possible (a few sentences to a half of a page). 2) Answer to: Describe what happened during the incident. What specific details do you recall that made this experience memorable? Please provide as much detail as possible (a few sentences to a half of a page). 3) Answer to: What was the specific outcome of the incident? Was it successful? Was it unsuccessful? Not sure? Please provide as much detail as possible (a few sentences to a half of a page).

2	1) A product the client wanted to bring into the US became unavailable. 2) The main product the client wanted to sell and had been selling successfully was discontinued by the manufacturer for no apparent reason. / It was a great seller! / We approached them to reconsider 3) They increased the minimum order quantities - we got the product - that took 9 months. So we had to execute other areas of the plan while this was being resolved
4	1) As a new business, one is inundated by every radio, television, print media companies wanting you to advertise with them. Some of them make a very good case based on readership statistics and pricing promotions. Being new, you can be more vulnerable to accepting an offer for a Holiday Gift Guide for example, that ties you into purchasing additional ads, or something like that. I deviated for a Holiday Gift Guide that was going to be sent to a high number of customers that met my demographics, in a wealthy suburb of my city. The ad space was free IF I agreed to do 2 more ads in subsequent issues of my choice. I agreed to do the ad because I'm trying to also build brand awareness. I feel the ad was effective and brought additional customers to my store that otherwise might not have known about me, however, as I have now done one of the subsequent ads, it's not really been as effective as the Holiday Gift Guide as it hasn't brought the same type of clientele into the store. Also, I know feel that it might not have the positive effect on my store image because of the type of publication it is. 2) The publication that my ad is in usually features coupons for customers. I did not have a coupon attached to my ad in either the Holiday Gift Guide or in the subsequent publication. I had several calls about whether I offered any kind of discount, which I do not. I think the ad looked out of place in the publication. 3) I'm not sure if it was successful or unsuccessful. Is it better to only advertise in certain publications or is it better to get your name out there in a publication that reaches a larger audience, an age old problem I'm sure.
5	1) As we roll out a new service or update to an existing service the delivery of the information is often a secondary thought process by individuals in our organization. There have been instances where the appropriate information was not provided in format understandable by the recipient leading to the confusion and frustration from the user. 2) Employees become confused and frustrated leading to a missed opportunity to market a change to a current process or benefit. Instead of a win for the company a perceived loss of benefits is taken away from the programs roll out. 3) A re-education program had to be developed and implemented to ensure the employees understood the changes being implemented. The roll out was ultimately successful; however, additional man hours were spent that could have been saved had the marketing plan been implemented correctly.

7	1) Change in expectations. The market was less sensitive than what we thought therefore we had to change our plan to add a more aggressive component. / We had to buy market from some competitors in order to position ourselves where we wanted fast. / We knew that once the word was out we would have the competition trying to copy our model (which has no big entry barriers) 2) When we decided to go more aggressive to the market we got a positive response. More Independent representatives (insurance industry) reacted and called us to know more about our model. We started recruiting more people in a short period of time. If we had not changed to this more aggressive mode once we had the initial reaction of the representatives we would have lost the opportunity. / 3) Direct mail was changed to a members meeting ...We determined from others in the industry that our best plan of action for the dollar was face to face ... not mailings we had a much better response to our face to face interviews
9	1) Changing the cost of a product line to ensure a sale. 2) The product was sold. 3) The product was sold to a small church. To ensure its sale a discounted price had to be offered.
10	1) Deadlines were changed. Product for the promotion changed due to elements being unavailable 2) Being unprepared for the change and the deadline closing in. A change in product means a change to an ad layout/images. 3) Not able to completely gauge the result due to being an ad. Clients don't always order as indicated on an ad to obtain a particular special pricing.
12	1) Deviation occurred when we decided to change to a different form factor of product. 2) The deal with a partner fell through so we had to go with an alternate partner for product development which caused a major different in product features / attributes / market introduction. 3) Successful but delayed launch
13	1) Direct mail was changed to a members meeting 2) We determined from others in the industry that our best plan of action for the dollar was face to face not mailings 3) we had a much better response to our face to face interviews
14	1) Encountered events that had not been predicted such as higher than estimated costs or greater than estimated time required. 2) Pricing for a specific marketing piece had been quoted by designer to include production costs. When we were ready to proceed discovered that those costs were not a part of the original budget. 3) Revised and implemented a portion of what was originally planned
15	1) Had an opportunity to add Plasma TV's to our Visitor Center and use for additional advertising stream. The additional promotion added value to our existing services and provided new sources of revenue....2) It allowed us to move into the 21st century with new technology and provide more of a "wow" factor for our center...3) Very successful as we were able to increase revenue and enhance our existing client's value.
17	1) I had to deviate from my prospecting focus to current customer needs and growth 2) I have focused on new accounts while maintaining current customers, but my growth was with current customer base. 3) I increased sales by 38% for '07
19	1) inaccurate competitive assessments. 2) release of competitive product changing the value proposition. 3) Change of bundling and pricing, altered channel policy and aggressively promoted to end user.
23	1) New competition opened. Food and Beverage outlet opened. 2) Review of new competition, rate strategies, additional advertising implemented, revised service plans, implemented new menu and pricing 3) Too early to determine.

26	1) Planned marketing campaigns were put off to allow for PSAs and other op-eds to discuss advocacy issues. 2) Priority shift was evaluated within the context of the overall objectives of the plan -- so while deliverables changed, the strategy did not. 3) PSAs and Op-eds were substituted for other planned marketing activities and met the expectations of the client.
27	1) projected customer desire for products increased faster than anticipated and we had to accommodate the increase 2) we put out a marketing piece and received a huge customer response...the phones wouldn't stop ringing...we had to come up with a different strategy for meeting customer demand 3) it was successful. Instead of concentrating our efforts on just internet customers we were able to accommodate non-internet orders as well.
28	1) Sales required more brand support for a new product so we initiated an integrated direct mail and magazine and web campaign. 2) The magazine, internet and direct mail campaign supported the sales awareness for new product switch from the previous product offer. 3) It was a successful campaign measured by the meeting of sales goals for conversion switch to new product.
30	1) Supply issues with our primary business partner forced us to reconsider our exposure and dependency on a single distributor brand. This led to a decision to create a house brand, with total control and higher margins. 2) Lack of sleep, frustration, loss of revenue, relationship testing to name but a few. It was also extremely difficult to change course midway given the lead times and equity built into existing product ranges and relationships. It was also a test of calm objectivity and due diligence. 3) We launched a new brand that has achieved traction in the marketplace and a platform that we can build on with confidence. Early days but promising.
32	1) The instance was when an unexpected change in the development of the product surfaced. It has happened a couple times while developing a plan and both times it was the result of trying to get a jump start on the marketing of the product before it is fully developed and tested. Luckily, in both cases the change in the product development was a positive change. 2) Coordination and communication of information between the product development people and the marketing people became a real issue... problems arose with scheduling, purchasing packaging materials and advertising. 3) It was successful but at a price (financial, psychological, etc)
34	1) the marketing plan was designed but the implementation was not fully achieved as financing the plan became difficult. We had to temporarily suspend the plan. 2) The service was okay but not being able to execute the marketing plan did not go down well with staff. we decided to make sure we had everything we need before proceeding. 3) it was suspended
39	1) We had chosen certain service lines to feature t/o the plan. We had to adjust to combat the marketing efforts of another facility. 2) We are a hospital. We had pick service lines that would help both our technology image and our bottom line. When a neighboring hospital decided to highlight a service line that we directly compete with, our board and a few of the affected physicians felt we needed to highlight their service, even though their service line was not a profit leader. However, it is important for us to keep our doctors happy, so we made concessions. 3) Hard to say, healthcare is a very hard industry to do ROI. Our doctors were happy and we did not seem to lose business to our competitor, so overall, I would call it successful.

40	1) We launched our new packaging, labeling and marketing campaign only to be confronted with extreme cost increases on our raw materials which forced us to implement a price increase. For a small, family-owned company, this caused a major disruption to the timeline for our marketing plan. 2) The cost of high fructose corn syrup went up 37% in a 12-month period, the cost of our bottles/caps/labels skyrocketed when oil went over \$90/barrel. 3) It forced us to take a step back and reevaluate our whole marketing/business plan. We had to put many of our initiatives on the back burner due to the financial constraints imposed as a result of the rapid rise in raw material costs and lack of a corresponding rise in the sales price of our products.
41	1) We were not quite getting there with the people we had in management. We found a Chief Marketing Officer, he did some lengthy analysis and persuaded us to go a different direction with the plan. 2) We had thought about doing what he suggested we did, but we were unable to implement it without him. 3) The outcome has been tremendous. We are well on our way, finally.
43	1) WHEN PROJECTING THE ADVERTISING BUDGET WE HAD TO REVIEW AND ADJUST AT 7 MONTHS AS SALES WOULD NOT JUSTIFY THE INITIAL BUDGET COST ALLOCATION. / CASH FLOW INDICATED A CORRECTION WAS IN ORDER. 2) GROSS SALES DID NOT STAY WITH OUR INITIAL MARKET ADVERTISING BUDGET. WE ALSO HAD TO RETHINK A PART TIME PERSONS HOURS TO COST. 3) PARTIALLY SUCCESSFUL. AT THE END OF 9 MONTHS WE AGAIN NOTED SALES DROPPING OFF FROM ADJUSTED PROJECTS AND ONCE AGAIN HAD TO AMEND EXPENSES TO COME IN LINE WITH "RISKMANAGEMENT EXPENSE RATIOS" AS A PERCENT OF SALES.
45	1) A budget was changed due to cuts in a specific program. 2) Needed to reflect the new cost structure and convey this employees. 3) This was successful to a point. Since we took a loss of money for the budget, we needed a way to make the money last an entire year, instead of what should have been money for a quarter.
46	1) A new competitor entered the market. The competitor located the business within a mile of my client. We had to adjust the plan to aggressively counter competitive advertising 2) The competitor heavily discounted a product my client sold. We countered the advertising by discounting the product pricing lower than advertised by the competition. 3) Yes it was successful as it relates to increased floor traffic but the profit margins were lower.
47	1) adjust markets as sales data is obtained, it is important to use a marketing plan as a guide and it is a living document that allow you to constantly fine tune your marketing efforts as new data is gathered 2) sales in certain areas of the marketing plan or publicity caused a more focused approach to certain markets. for example if a new product get picked up on Good Morning America, then the awareness is instantaneous and you need to build on that 3) increased product awareness, sales and marketing opportunities
48	1) Advertising opportunity came up or I was asked to participate in trade show by a manufacturer. Or a manufacturers co-op advertising funds needed to spent in a timely manner. 2) Spent money that would normally not have been spent because of a use it or lose it policy. 3) No worthy ROI.

49	1) Assumptions about the product pricing needed to be adjusted and caused us to revise our sales targets upwards to meet profit goals. 2) Fast moving technology caused prices to be lowered as we were rolling out. We quickly changed the product pricing (there was room) but needed to up the sales forecast and the supporting activity. 3) Not sure yet, but sales are on track to meet profit goals
51	1) Change in the sub-prime lending rate, market situation and the general economic mood changed the externalities of the business. This required change in marketing strategy. 2) In spite of the falling dollar value, and the speculations about real estate, people who had their foundations in the business and knew their fundamentals, did not feel the pinch. Overseeing the marketing for such a firm is a pleasure. 3) New strategies to generate business led to new partnerships and change in focus from one service to another.
52	1) Changes in financial position (customers going bankrupt, etc) 2) Delay in plans for additional staff delayed implementation of some of the marketing actions planned. 3) Normal, mid-course adjustment. Remained focused on achieving the goal and finding ways to conserve both time and money.
54	1) Critical facility for production was no longer available. 2) Postponed the bring-it-to-market until we could find another facility. "Memorable"??? Kinda hard to forget we had to shelve the plan. 3) Yep, the incident was very successful in causing us to shift 100% of our available resources to an entirely different *corporation*.
55	1) Deviation from marketing plan was due to lack of working capital to implement all marketing plan elements. Capital for implementation was planned to be derived from fees derived from client fees associated with engagements. Further deviations from the plan were due to the need to focus on the completion of client projects. 2) Please see the statement above. / 3) We are still in process of securing working capital to launch the marketing plan. /
56	1) Discovered market conditions that varied from baseline assumptions and historical trends. 2) Reviewed the fundamentals of the plan to validate the overall plan. Determined that tuning was required, not an overhaul. Strengthened the plan and validated the core strategy. 3) The business was successful. We achieved all of the key objectives and we were ultimately acquired because of our market position.
57	1) Early results showed higher-than-anticipated success rate from one key strategy. 2) Had to shift resource allocation to more successful strategy 3) Good segment penetration with this strategy...but unknown lost opportunity from reduced support on other strategies.
58	1) Found out that there was going to be a delay in obtaining regulatory approval for US launch of product. Delayed marketing efforts in USA and focused on European sales. 2) New hurdles surfaced, realizing a delay in obtaining regulatory approval. We canceled planned attendance at conferences, workshops to delay expenses until product was approved for sales. 3) Delay was not planned; however, we acted quickly and focused attention on European market, which up to that point was secondary. This allowed us to show traction in European market, which led to increased investor confidence. Allowed us to work out some kinks in Europe for a much stronger launch in USA.
59	1) I changed my approach due to other media options that became available. 2) I had a set plan and used other option when they became available 3) It was unsuccessful mainly because the media outlet basically failed me. they did not provide what they had

	offered.
60	1) i hired an outside agent to book radio interviews rather than do it myself. 2) it was a wise decision because the interviews have gone well, but it increased the cost of marketing. 3) I am pleased with the outcome. The product visibility has increased far beyond where it would have otherwise.
61	1) Industry regulation shifted, requiring a change in strategy 2) Additional administrative resources were required. 3) A shift in work load was required to accommodate the need. This slowed sales growth from planned projections.
63	1) Lost lease opportunity in proposed store location. 2) Had to unexpectedly change plans and move all show cases that were ordered for the new business to the basement of our home. 3) Have now set up a small wholesale operation from the basement of my home. Not ideal but I had no choice.
65	1) needed to define a different market segment (secondary) 2) increased media expense 3) positive - successful
67	1) Offered a deal I couldn't refuse! 2) I got "found" by other "top" companies. 3) Referrals! Inclusion in magazines, on TV, linked to....
68	1) Original launch date and campaign were revised due to marketshare information received in regard to competitors. Able to recalculate and create more powerful plan. 2) Due to the revisions and relaunch, our initial response from customers was overwhelming and the product is taking off. 3) It behooved us to regroup and realign our direction and the final outcome was very responsive.
71	1) Product development/engineering was not going to make its deadline for some new products we were planning to launch. 2) Once I was informed, I needed to modify our e-marketing schedule along with delaying some direct mail promotions. I also needed to communicate to our dealers that the products would not be available at the time we originally promised which delayed some of our dealer marketing activities as well. 3) Not sure at this point. Some products are now ready and we have just started the marketing efforts, others are still in progress and thus marketing efforts are on hold.
73	1) Reorganization drove refocus on plan 2) More focus on fewer products 3) Successful
78	1) the market was disturbed by political upheaval and customer industrial stop heavy products inquiries 2) just shift to day to day industrial product consumption just to continue selling instead of focusing on huge products 3) it was successful as i discover a new segment which was not neglectable at all
80	1) The plan included two networking groups but we added a third because of positive feedback about the new group 2) The third group was very active (meeting twice a week) and we found that we were not able to keep up with all three groups effectively 3) We dropped the third group to go back to our original plan
81	1) The potential new clients changed as the market changed. The plan was for a custom home builder. Once the market changed the potential client base narrowed. 2) We increased the amount of dollars spent on each potential client but lowered the target. 3) Very successful. We focused on high end rather than all ends. Seems simple now.

82	1) The services most in demand were a very minor part of the original plan 2) When interviewing clients the services offered were not needed but it led to developing services that were desired 3) highly success. It led to a long term services contract.
86	1) we added an additional mailing list. / we used direct mail more times than planned 2) we wanted to gain new customers thus adding new mailing list. / we wanted increased exposure 3) additional mailing pieces were trackable and worked.
87	1) We deviated from our marketing plan when a client requested a different approach to providing our services. At that point in time, we began to market to non-pharmaceutical funding agents toward an international audience. This was accomplished utilizing existing marketing materials customized for the Dubais Healthcare City population. 2) It was memorable because it opened the doors of our services to Dubais Healthcare City, and shifted our focus on funding. In our business plan for continuing medical education, the pharmaceutical industry was the funder of continuing education....as that industry and objectivity has been brought into question, it has allowed us to remove all potential concerns for bias from our educational products, shift our business plan to earning the money on the back end instead of the front end, and improve patient outcomes in a different country and region. 3) Thus far, it has been successful. We will not know the level of success until the end of the 12 month plan (benchmark at 6 months will provide a clearer picture).
89	1) We made an adjustment in strategy due to a marketing opportunity that presented itself in the form of a strategic relationship. This required an adjustment in message. 2) Because we consider our annual plans a guideline versus a concrete path, the adjustment was easy and meshed quickly into the overall plan. As we made the adjustments, we actually saw new ways to leverage existing strategies in the plan for better effect. 3) The change was quite successful. I estimate that we exceeded planned results by better than 22%. Using an annual plan allows us to stay focused and on message. Additionally, it allows to maximize results from opportunities that drop in our lap like this strategic partnership did.
90	1) We needed to alter our speaker series schedule and increase the amount of advertising we had allocated for it. 2) As a result we were able to increase our advertising at the same time saving money 3) Absolutely very successful
92	1) 1. Sales rollout delayed due to clinical trial delays. / / 2. Last plan service implementation plans delayed due to delay in getting facility ready for operations. 2) First situation was a failure of the product during attempts at mass production and a feature problem requiring redesign and testing of new prototype products. 3) Product feature was successfully redesigned with production of high quality products. Clinical trials delayed further because new clinics had to be solicited. Company eventually ran out of money.
93	1) A competitor entered the market. I required an adjustment of pricing and promotion. 2) We lowered our prices and advertised via direct mail/internet 3) Our sales recovered well. The competitor has since left the area.
94	1) A couple of promotions were rearranged due to an increase of cost from another. This in turn changes advertising plans as well. 2) Line Item budgets were gone over to see where the needed money could be shaved from. Needs were prioritized. 3) So Far So Good. Because we weighed out the consequences before, it was a natural decision to take from a unmeasured event or promotion to fund one that has been proven to be successful.

95	1) A new service was offered midway through the plan. Found alternative means to communicate it to clients. 2) New market that was never reached was established. Unique demographics regarding client location and an untested delivery location. Identified communication opportunity and executed decision. 3) Clients were please and we increased our business significantly for new location. More growth potential exists.
99	1) Budget cuts prevented multiple promotions. So the entire media, promotions and ultimate lauch plan of the new products were reworked. 2) Lots of posturing among the heads of the other product teams for more money. Forced people to really contemplate what were the most critical "must-do" tactics. 3) A broad launch became extremely focused and targeted.
101	1) Capabilities of the organization were not as broad as we believed. We had to cut back on what we offered customers. 2) We reviewed the marketing strategy and re-directed the sales effort to more effectively target prospects. 3) We were able to identify specific opportunities that kept us in a more narrow channel, and allowed us to focus our efforts.
104	1) Changes to our ability to internally produce the products to suport the plan. 2) We grew the business faster than we could add manufacturing capacity and support people. 3) We reduced our marketing plan a segment of the business.
106	1) COGS increase. / What features were we willing to give up and how did that affect market. / Gave up features for a small potential loss in market. 2) Gave up features for a small potential loss in market. 3) As most of marketing is speculative, there was no solid base line existing to measure the success or failure of the specific decision. / That being said, the product was still successful in meeting the sales targets.
107	1) competitor products became priced better, needed to change the focus from price to service and build more personal relationships. 2) Started loosing customers as the direct result of price, stopped selling on price ALONE and began better educated the customers about all the other included benefits of their policy. 3) So far very successful, retention has been steady. Customers love the calls and time we are taking to better explain their products.
108	1) Did not consider the cost of professional liability insurance (e and o) which needed to be addressed for one consulting engagement. 2) Could not engage with the client until insurance was in place. Needed to restructure price scheme and then include the cost for future quotations. 3) Secure deal and now using that as part of the marketing effort.
109	1) Due to loss of a major customer just as plan was nearing completion stage, had to refocus target which also meant a refocus on services being marketed. This caused a delay to implementation of plan. 2) Biggest headache was reviewing current, future network capacity so that we ensured that we were marketing the correct services. Due to the potential lost of service, it opened capacity on network and we were required to add a service in attempt to take the place of the lost customer. 3) Adding a service required reviewing all the collateral to ensure that the proper services were included. Actually, was a successful outcome. Realized more sales that expected over the lifetime of that plan.

114	1) Interest in a distinctly different category of product that my firm usually offers popped onto the scene. Made sense to pursue it because it wasn't a significant user of time or money, and it was related to my interests. I publish books for Nordic skiers and complementary gadgets for training them. This new product was an inclinometer that's very easy to use (sits on a ski pole) and would be used to reduce avalanche risk. 2) The key for me was that I had the subject-matter expertise to move on this opportunity without a lot of background time. I conceptualized the product almost instantly as a result of my own time spent in the winter backcountry. It was a fit even for Nordic skiers, who are crossing over more and more to alpine touring to take advantage of their fitness and basic skills, while expanding their total ski experience. 3) Prototypes were created and are being tested, refined. I'd say that there is a 60%+ chance of it being introduced within the next 24 months. The prototype worked. And many of my specialty retailers also offer backcountry gear, so there's likely a decent fit with existing channels. It's also small and so fulfillment would be a snap.
116	1) Learned that getting people to the web site required more bill boards than first planned 2) We asked people how they found us. / / In my opinion bussiness and marketing plans are maps and direction. Once they set sail, the winds can change, the weather can cause them to get off course. In my opinion, they should be built to change and if they don't, I may be missing something. 3) We got four times the web visits than we were getting
117	1) Market and buyer decision changes 2) The overall plan was delayed in execution by 3x the change period 3) Better Strategy
119	1) My expectations with one advertising method were not up to par so I reviewed my plan and determined that there were several other approaches I needed to pursue. 2) I hadn't considered the approaches before. They provided new markets that connected with my past and previous connections. 3) THe new market was very successful and increased revenue 20%.
120	1) New information became available that justified modifying the marketing plan implementation. 2) Competitor launched a new product earlier than anticipated. 3) Go-to-market strategy was adjusted in light of the new competition. Targeting was refined to circumvent competition.
122	1) New trade show opportunity presented itself which was not in the budget. 2) Dropped some other activities to pay for attending this show 3) Will be attending show Sept. 08
123	1) Opted not to buy/rent a list of business appropriate contacts; rather, cranked up our own inhouse call & gather contact information, history of our type service use, future plans, frustrations -- began a dialogue that wizened our language and subsequent direct mail & email campaign. Focused counting -- how many completed calls, how many retargeted accounts. 2) the script! the listening script! the hearing script! Bullet points on white boards and tear sheets on the walls in the calling center. the script pulled valuable updates, new directions and key information -- the results recast the marketing message. Everyone on the team felt AHA moments that moved the message only after a weekly vetting. 3) ... brand recognition and a better sales conversation. The sales cycle here is 6 - 9 months on average.

124	<p>1) Original Media methodology did not have the affect I anticipated, deviated from plan and changed the media type to address the issue and overcame the situation and made a dramatic difference in the overall results in executing the plan; accomplishing the original goal, strategy and targeted audience but with a different type of media. 2) Media launched and traffic for the retailer was not as expected. Within 2-weeks made adjustments to media buy and executed again to accomplish the desired result. Memorable because it was a large media buy and had to negotiate with media planning and buyer to accomplish the change with vendors communication companies etc in a very demanding, expensive and dense population. / 3) Success. Achieve the ultimate desire goals with the same strategy but with a different media execution. Client was impressed with the measurement, astute observation, nibbleness in response and ultimate execution that ultimately had no effect on retailer and accomplished desired and planned results.</p>
125	<p>1) Our plan was to pursue business with selected European turbine engine repair firms as our primary market. We made a very good contact with an engine repair firm. This senior manager then accepted a position as CEO of an airline. We continued to develop this contact and it has proven to be highly instrumental in us establishing ourselves as the principal supplier of aircraft components and parts to this airline. 2) It's a simple story. See above. 3) We are now supplying over half of the aircraft parts and components to this airline, and because of the good relationship with the CEO they are paying us very well. The bottom line is this: in any plan one must be prepared for the unexpected and be ready to deviate from the plan when it's appropriate, rather than to stubbornly adhere to a plan and ignore great opportunities that may pop up along the way.</p>
126	<p>1) Price increase from vendor 2) Advertising vendor increased prices mid-stream causing us to re-evaluate our media plan. 3) Yes...we revised media delivery and vendors allowing for more reach and measureable results /</p>
127	<p>1) Product lines took advantage of opportunities to promote the product prior to launch dates, in forums that were not included in our plan. Although the opportunity was valuable, it created challenges for us in quickly communicating the new product attributes to existing customers. 2) Some existing customers approached us about the new product, and mentioned that they would have liked to have heard about the new service directly from our company instead of secondary sources. 3) We reconciled the situation with our customers by extending a special offer not available to the public, and smoothed over the situation with the customers who had alerted us to the initial situation.</p>
128	<p>1) Situational, budgeting and tactical variances. Cost of goods and fixed expensed variances leading to profit gap. 3) Use of sales promotion, gorilla marketing to increase volume and aggressive reduction of costs. /</p>
129	<p>1) Some of the promotion strategies did not need to be accomplished. Sales reached desired levels before the next phase of promotion was to implemented. 2) It was all good...more sales less expenses are positive. No need to spend money when the product doesn't need any more advertising. 3) Yes total success</p>

132	<p>1) the idea was to market segment within msa areas from top dollar areas to lower. A national broker with connections persuaded us to focus on distributors instead disregarding end users. That the distributors with highly trained managers & years of experience utilizing total market saturation (a shot gun approach) would successfully pepper the area and sales would sprout, through strategic product placement. 2) Distributors highly trained personnel were cultivating a new culture of / self greed. Owners did not have sway over their sales managers nor the sales managers with front line people. Whats memorable we had commitments of 200+ locations in Manhattan from a trade show to having nothing come about with / the distributor. / 3) Complete bust, a marketing plan was created in the beginning from the / supposed success of NY, the Florida plan was started on a presumption. / That later proved false, in a state of paralysis alternative strategies / were difficult to filter, going from a national strategy to a localized / strategy. A knee jerk decision was made that was fatal.</p>
133	<p>1) The main core of the business was supposed to be product selling but because its an IT company we thought of consolidating the servicing and maintenance of IT equipment as well hence the change in the plan 2) We realised that we were going to lose a lot of potential revenue if we had not co-opted this part of essential service to the plan 3) It was successful because once you create your own identity in the market on how you perform your work you will never go wrong. It has been an experience where we are getting a quite significant amount of revenue from what we had ommitted initially in our marketing plan</p>
134	<p>1) The plan didn't take into account a recessional situation in the city it was located in. More than 70% of clients and revenue was from that same city, so the plan needed to be expanded to other geographic areas. 2) We built on areas where we had some existing clientele, using referral marketing and networking. Our plan to expand in other geographic areas was heavy for the first six months, then tapered over the following six months. 3) The plan was successful. It was very labor intensive, but we were able to meet our numbers and actually grew the business about 30% more than anticipated, even with our local losses.</p>
139	<p>1) We began a large (for us) TV advertising plan. We had set schedules and stations to run on. We decided (after the fact) to avoid running these ads during holiday periods. / / We thought our campaign would be much more effective if it wasn't run during these periods where potential customers were on vacation, home with their families, etc. 2) We found it was a good decision. Our call volumes were significantly higher during non-holiday periods compared to hoilday periods. 3) We were very glad we skipped the holiday periods for our advertising because our service (back pain) had nothing to do with holidays such as Christmas, July 4th, etc.</p>
140	<p>1) We conducted an email survey to a mail-list of 30,000 (built up by the business over the prior 2 years). The participation rate was higher than we had planned, and so we decided to conduct some additional surveys, and make the email survey element a more significant part of our overall marketing outreach. 2) We had expected a 1/2% to 2% response rate. The actual response rate was 4%+. That caused us to conclude that the survey population was interested and willing to provide meaningful input ... so we developed some additional survey instruments. 3) We continued to experience a 4-6% response for a series of 3 surveys.</p>

141	1) We found that our product had an affinity for the SMB markets. It was first targeted at Enterprise customers. We had to add to our plan a way to get to the SMB market -- thus, began to establish channel partners that focused in this space. 2) We had to convince our BOD that the SMB market was worth pursuing through channel partners...Presenting to the BOD was a challenge as they were set on only the Enterprise market. 3) We delayed the decision to enter the SMB market -- as the BOD would not appropriate any funds. We still believe that we left many \$ on the table because of this.
142	1) We launched a new T-Shirt lined and quickly found out that our market was off as well as our projections. 2) We were at a trade show and the t-shirt which gained the most attention was for women not men. 3) We changed our focus and began to concentrate on women apparel.
143	1) We planned to introduce managed services for a select group of clients in one vertical industry. It turned out that our market research was flawed and the revenue streams did not materialize as planned. We switched gears by diverting resources to the development of other resources and not entering this new, less-developed area. 2) Basically, customers did not buy the services at the rate we anticipated. Offerings were made but were either pocket vetoed (client did not respond to our offer) or phone calls were received stating that the client was not interested "at this time". 3) By diverting our resources to more established service lines, our return on investment immediately increased. By marshalling our resources to better defined markets within our community, we were better able to concentrate our talent to specific projects while at the same time re-training our staff and re-educating our clients to the newer services. Eventually, this will bear fruit but in the interim our marketing plans had to be revised to take into account this apparent deadend. We have not given up on expanding managed services but we are taking a more methodical approach and doing out research in more detail.
144	1) We were implementing the marketing of the University ad found out that one market segment was not responding at all for a reason we only confirmed at a late stage. 2) we had to cancel the addressing of that market segment. 3) It saved us some money in the marketing project.
146	1) while implementing mktg plan in one project successfully the owner of the project being association incharge appointed me as consultant of the association . I deviated from my marketing strategy of one to one marketing to group marketing thus having unforeseen cash crises and focus changed from short term to long term strategy implementation . still by reviewing my original strategy i have been able to blend it again with my main plan. it seems to be an example of emergent strategy concept by prof. Henry Mintzberg. in case you are interested I can give more details later. contact 2) as above 3) as above
148	1) A major component of the plan was to utilize a partner for marketing. 2) I pulled out of the partnership due to lack of confidence in the partner. It turned out he was not a good fit with my values and goals. 3) I successfully terminated the relationship . . . but needed to fill that marketing gap with other means.
150	1) As a professional services provider, we need to deviate from the marketing plan when key staff changes occur either on the client side or the provider side. 2) We opened an office in a new geographic location - with staff moving, our plan of who would be the key contact for whom had to change. 3) Too soon to tell, just happened in Dec. 2007

151	1) Assesment of local areas faltering economy required a minor deviation and adaption basad on consumers input. Essentially bringing in lower priced merchandise. 2) A consumer simply stated that they wanted to do business with us but " I just do't have the money", we asked what we could do to help her become a customer she said " offering lower priced items outside our normal product line". We chose items that complemented our current inventory without bringing down the value of our stock. 3) we have yet to recieve the inventory.
153	1) Budgetary considerations arose unexpectedly to table some early campaigns in a project that I implemented for a client. We postponed the preparation for the campaigns and moved to a less capital dependent activity. 2) What I realized that when discussing the markeing plan/ business plan that the client was much more positive about the implementation before it came time to write a check. Resistance due to existing market dynamics (real estate) was a tough objection to overcome despite conservative analysis and projections. 3) The incident was definitely delayed and although we can measure the tangible cost savings I cannot measure for certain the lost revenue. Since the plan has not been only delayed and not tabled completely I am not sure I could measure success. Lost time however, is a huge consideration.
155	1) Changed from direct mail to out bound phone calls. 2) The calls were much more successful. 3) Yes. Had more orders for the new product.
156	1) Changed the criteria for potential clients. 2) Allowed us to focus attention on a more qualified prospect base. 3) Better qualified leads resulting in more business.
159	1) Creation of products not exactly on the plan 2) They sold in the situation in which they were offered. 3) I consider it successful and planning is underway to provide more / of this type of product.
162	1) Direct e-mail campaign to membership list (double opt in). 2) Percentage of positive responses was lower than anticipated. 3) Split list into more refined targets and tailored message to each target group. Response rate increased to a satisfactory level.
163	1) Discovery of how certain services are contracted in other regions caused reconsideration of certain plan aspects. 2) Certain regions do not use prescribed contract language for specific services, causing the same service name to be delivered with varying content. 3) We have published a "catalog" that includes the appropriate contract language for all regions.
165	1) Entrance of a new startup competitor in the area caused a deviation from the budget (increase) and solidfying relationships with suppliers. 2) Saw a big increase in online marketing spend to counter the new competitor. 3) In the end, the increased budget worked better than expected and slowed the competitor's growth and foothold, and had an immediate impact on increased inquiries and bookings throughout the year. With a 30% increase in online marketing spend saw a 85% increase in sales directly attributable to the new budget.

167	<p>1) First, it wasn't an incident. And deviation from any of my plans is expected. Time changes things and you need to be flexible. A plan is not a rock-solid entity... it's fluid. The timing of in-store delivery of one of the featured products changed, so we needed to accommodate that. We simply re-worked the numbers and didn't count on sales contribution from that item. 2) As manager of the project I check in on a regular basis with the key contributors. If there is ever change in timing, delivery, expectation, etc... I work with that. Assess the new situation and make any course corrections, if necessary. I try my best to ensure we can implement what we plan - as the plan is connected with anticipated revenue. So if execution of the plan changes, so might the deliverables. 3) Absolutely successful. Going into a project knowing that things in and out of your control may affect what is ultimately implemented is okay. We moved the communication of that product to the next phase in the calendar and it made its appearance then. The customer never knew the difference. THAT is the important thing.</p>
172	<p>1) I had planned on writing articles about the workshops, but found that the time between writing and publication was simply too long to have any kind of immediate impact. So I abandoned the idea. Also, the initial queries got no responses, so what was i to do? 2) It was so disappointing for I really thought articles could be a really good marketing tool for me, and a way to help readers with real, solid information. 3) No marketing effort.</p>
174	<p>1) I wrote the marketing plan to assist in a start up company. The CEO of the company did not stick to the business plan and therefor strayed from the over all marketing plan. 2) The sales and marketing departments were extreamly over burdened by the constant changes to the products and services being offered. The company was changed significantly to the point of voiding the marketing plan within 3 months. 3) The company is still operating, but I resigned do to the instability with in the company.</p>
176	<p>1) In correct wording on a brochure resulting in missed sales. 2) The client ordered a service that was advertised as a stand alone service, however the service was only meant to be offered as an additional service to a package. 3) We had to honor the client request and made the needed changes to the print media.</p>
177	<p>1) In the public sector,weare dependent on taxpayer funding. If tax revenue goes down, so does funding. In California, career technical education (Regional Occupational Programs) has been asked to slash 10% of its budget. The superintendent decided to delay implementation of our strategic plan--all marketing--until times are better, and we are meeting now to rethink class offerings and marketing. 2) The decision to delay the strategic plan was unilateral--the team had no say. 3) Can't be sure--it is a plan undone--so how can we know the outcome of a plan unimplemented? The one sure thing is, we will not spend \$100,000 this year we otherwise would spend.</p>
178	<p>1) Introduced a membership type that was not in the original plan. Basically circumstances and competition dictated some course corrections. 2) Actually enjoyed the abiltiy to quickly respond to changing market conditions and introduce options not offered amongst the competition. 3) It was somewhat successful. However not doing it would have not been useful and certainly couldn't have been deemed a success.</p>

179	1) Launching a complementary software product to an existing line. We were looking to supplement the software with a directory submission. In order to get the rankings for the website a blog was created. 2) The reason for the deviation was market timing, and also resource allocation. Time and money assumptions were made during the creation of the business and marketing plan, which eventually changed. This led to a change in scope and a change in plan execution. 3) Yes, the rollout of the new product was successful, but only after significant changes in the design, functionality, and navigation of the directory submission process.
182	1) Marketing plan called for implementation of simple user interfaced software as primary tool for B&M store promotion. Software however advanced to intermediate knowledge base user and education program had to be revised to include intermediate to advanced classes at B&M retail stores 2) A real division amongst the founding partners as to how to best approach target market. Neither partner could resolve their differences and the entire education program was postponed leaving many retailers disillusioned. As a result of the quagmire, the business Alliance that had been built up surrounding the software component ceased to play an active role in the development of the entire project. Very discouraging situation and I left the company, a senior Marketing Director, as a result. 3) As stated above, the result was the Alliance dwindled in participation and some companies left the Alliance altogether. The two partners were engineers and had little regard for Marketing professionals. The resources for my salary were provided by a grant from the government of Montreal so the partners did not have a vested interest in my marketing plans. Most unfortunate for them. A year has passed and the Alliance is a non-functioning entity.
184	1) New opportunities for marketing became available. 2) Had the opportunity to form relationships with potential referral sources. 3) Still waiting to see; expect good results
188	1) One word says it all -- budget. The money we anticipated wasn't there, so drastic changes had to be made. 2) We had a long drawn-out period of "nothing-ness". 3) No. We couldn't implement anything, and then, when we did get the \$\$ we were WAY behind!
189	1) Our marketing plan was rather general and therefore when we targeted a specific market we had to deviate to meet the needs of the target industry. 2) As a service provider we are able to adjust to the market and actually modify our services to accommodate the market or potential customer is we foresee future work that can help sustain and/or build our business. If the need was too extreme from our core capability we would either decline to offer our services or refer them to other companies that can better service them. 3) Not Sure, as yet. The wheels of motion can turn slowly in our industry depending upon a variety of factors such as the customer's objective, urgency, budget constraints, and a variety of other factors. We are still cultivating relationship and maintaining contact without pushing the hard sell. Please be aware that we are a construction company and work for a lot of public agencies.
190	1) Outside vendor was not able to complete an essential task and the launch date had to be moved. 2) The realization that we didn't have absolute control was uncomfortable to quite a few people. / 3) One person at the vendors company was let go. The continuing relationship between our businesses is thriving however.
192	1) PPC ads were not effective for this product. We changed ad budget to press releases. 2) we determined that we were losing money using adwords cost-per-sale analysis. and we determined that we needed get more organic search visitors. 3) we sent targeted press releases distributed online and it helped our search engine placement and increased site traffic and sales.

193	1) Problem concerned errors in the project database, which caused errors in analysis, costs, and estimated timelines after the initiative was launched and we were taking public comments on the environmental impacts of the proposed projects. 2) We had to re-run the data and re-evaluate the cost benefit ratios, as well as respond to scrutiny from stakeholders, local governments, project sponsors, community and environmental interests, and the media. 3) The projects were finally approved, after several months' delay and re-evaluation.
194	1) reacting to increased ROI. 2) when ROI was better than anticipated, increased budget for better performing campaigns. 3) increases sales and profitability resulting in increased budget.
195	1) Re-seller pricing had to be re-adjusted to gain the support of re-sellers. 2) Re-sellers contacted simply said that they needed more profit for them to get involved in selling the products. 3) We adjusted the pricing.
196	1) sales data from the field caused us to constantly fine-tune and adjust our forecasts and message 2) overwhelmingly pointed and consistent information came in from sales reps in the field regarding a particular package of services we offered 3) the package of services was adjusted by our VP of WW Sales according to customer and prospects' specific feedback related to their objectives
197	1) Sending out one of our books that had been recently published to cold leads. We did not get a response, so decided to move away from the approach 2) After mailing the books and following up with phone calls, we did not get a response. I thought the \$80 book was a good way to introduce our company, but it did not work.3) The plan was unsuccessful.
198	1) Service upgrade could not be launched due to resource constraints (underfunded non profit caused underfunded engineering for web based service upgrade). Online digital books for the blind required a rewrite of the transformation code from scanned copy to navigable text in order to deliver on marketed promise of better quality books for the education market. 2) Customers did not renew in many cases because of non delivery of promised service. Took a number of steps back in the effort to make this non profit program self sustaining (minimal fee to various market segments would make the program self sustaining with two years). 3) I resigned the program and the job.
201	1) target market was not responsive. we changed targets 2) 2 staff members would have continued doing the same thing expecting a different outcome. 3) signed up 6 accounting firms. so it was most successful.
202	1) The client wanted to try direct mail, which was an unbudgeted item. He also wanted to try to reach an older, more conservative audience on specific promotions/programs. Which was another unplanned foray. 2) We did not fail and actually managed to increase awareness, trial and purchases of products and services from my client. 3) It was successful.
203	1) The initial product mix had an item that ran slow, but had very high margins. It was going to be made during the warm up phase of production each day. Large manufactures, like Weyerhaeuser, exited the market because it did not process enough paper fiber (tons) for a the ROI models. Once starting up a selling a few customers it was discovered that a large void existed in the market of high value product. My filling that need, we were able to become profitable within a shorter period, and finance internally our growth. 2) being able to sell five truck loads a day with a minimum gross profit of \$2,700 per TL 3) Was able to secure a contract with customer whose growth was being limited because of lack of reliable sources of supply. Their business had increased annually enough thre three years in a your to support a plant like ours with three full shifts of production. this customer is under the radar of traditional markets for our product.

204	1) The need for cash flow can change the intended direction of the implementation. 2) A service opportunity arises that generates cash and due to the need for cash we are inclined to take the project even if it is off target. 3) It did generate cash flow and we were able to get back to the target strategy.
205	1) The plan included requiring sales staff to choose segmented markets at the beginning of the year. I allowed staff to change from chosen segment in mid-year, based on results to date. For example, one manager chose automobile dealerships as a target. Mid-year, opportunities arose in another market and we pursued it. 2) Part of the marketing plan was to work on specific segments. Flexibility remained, however, to recognize new markets. When this arose, we shifted direction to the new market. 3) Record sales. New doors opened and the new market is now part of this year's plan.
206	1) The plan was for a non-profit HOA needing to increase its annual fees. / The community is diverse, 2/3rds are absentee owners who don't use the amenities in the community that drive the fee increase needs. Fees hadn't been raised since 1989 and increased costs were funded by reserves and expanded volunteer work. The crisis has been building for several years. 2) The Community completed a certain amount of marketing and was able to get a majority vote but fell 16 votes short out of 1321 possible to get the necessary 2/3rds necessary for the bylaw change. So the Board had to vote in a special assessment to meet the financial crisis. The lack of financial sophistication on the part of the community surprised me. Also, one member of the Board derailed and stifled some of the necessary marketing and the culture discouraged active confrontations over this behavior. 3) A partial solution was reached with the special assessment and the Board will try again this year with more and expanded marketing such as over the Internet and persuasive mailings.
208	1) The timetable was not realistic and we fell behind in the implementation. 2) The person providing the advertising was difficult to reach and caused us delays. 3) The whole project had to be put on hold for 5 months.
211	1) We altered the sequence of offering the different iterations of the product. We had patent applications and design license issues that precluded our submitting designs to public scrutiny and when we first offered our entry product, we found that the successor offering needed change based on inquiry from customers and prospects. 2) Opinion leaders and early adopters within two key target market segments immediately inquired about our initial product along lines that coincided with a model of our product we intended for later offering in series. We resisted, at first, introducing the line as we had prepared our sourcing and production for another, but the economies of making the change were significant, so we did so and we're glad we did. The logistics of our mix, now, are much less challenging than would have been the case had we proceeded as originally planned. 3) Very successful. A cost reduction in the product mix of 35% from budget and gross sales increment of 8% over budget.

212	<p>1) we are an IT services provider since 1990,two years ago we were to launch new solution business intelligence and we used the same database without taking into consideration the fact that this new introduced solution audience target was totally far from IT people and engineers and that business people were to be invited as to understand the concept and interact with their needs from function or analysis perspective then rely on IT department for tools knowledge or so ... 2) during the event held ,the audience were frustrated from one end and confused with regards to their role and future role . / speakers were obliged to focus more on tools as to be more familiar and friendly with the engineers attending 3) it was surely not successful ,message not relayed and people backfire on the organization ,the remedy was to send later new documents to IT and business people as to convey the right description of the new solution and make sure all parties will get informed and invoved benefitting from the power of the solution / another gathering was also necessary ,in a round table and the invitees were the decision makers</p>
213	<p>1) We decided that we would sell our products in Ireland with sales being controlled in-house. (We sell to the UK, Northern Ireland and the Republic of Ireland.) 2) We were approached at a trade show (we were exhibiting) by an Irish wholesale company who wanted to take over the Irish distribution from us.3) We were having trouble breaking in to Ireland as we didn't have a sales force on the ground there. In the end we made an agreement with the Irish company that they would have exclusive distribution rights for Ireland. This means that we supply them only, and not a lot of individual stores. They get an initial 20% discount from our wholesale prices rising to 25% depending on sales. This has proven to be very successful on both sides as, although we only make half the profit on the goods that we sell to the Irish company, they have sold more than twice as much as we could have since they are already in the marketplace. Also, our admin to achieve these sales is very small. Win-win situation.</p>
214	<p>1) We did not do enough assumption busting. Probably could have identified more issues and risks. Perhaps did not have a clear what and why, and the sponsor changed their mind or did not have correct information or a clear idea of the what and why? 2) Sponsor started asking for additional elements to be added to marketing plan without a clear understanding of the impact to quality, budget, and resources. Severely stressed productivity and morale of creative services and budget. 3) Reached the goal but getting there was painful.</p>
215	<p>1) We expected to produce more leads from direct mail then we were currently getting so we had to shift resources into other areas to make up for the short fall in leads. 2) We were tracking leads, quotes and closed sales. We were able to see what was working and what was not working and we reacted to it. / 3) We are still working on developing cost effective lead generation programs we can exporet to the channel. We are the manufacturer and sell through a dealer channel which is not used to selling new products. /</p>
216	<p>1) We fine tuned the recurring revenue model as we released new products or services. We changed the way we charge customers for software services provided on a annual basis. This related to our web-based or internet portal of software services. 2) We had some strong resistance from our Sales team at first but once they understood the new pricing model they liked it much better. 3) Still in process, but initial results have been promising. Sales are coming in from our customer base using the new price model.</p>

218	<p>1) We had a business issue that was game changing for us and at the time we needed to make a decision to deviate from the marketing plan. A competitive product we anticipated coming to market did so, but 12 months before we had assumed or had intelligence that it would. This forced us to accelerate our strategies and tactics to blunt adoption of this competitive product. 2) We had a 12 month publication plan as one arm of our strategy. However, we had just lost the time cushion we had planned to have. Therefore we commissioned the planned work and rushed some of the work in progress to help meet the competitive threat of this new (early)entrant into our market. 3) While we reacted and changed some of our plans, we found that our competitors were caught off guard as much as we were. Therefore, our accelerated publication planned help raise awareness to our product and was able to leverage the increased visibility the catagory got from the new product entry. We were able to pick up 2 more prescriptions over the new product entry as a result of our work.</p>
219	<p>1) We had licensed a technology from another company. Part of the requirement to keep the license was a specific growth rate and revenue that the licensing company had dictated to us. Once into the project and realizing how entrenched the competition was, we had to back off on the growth rate and revenue that the licensing company had dictated to us. That caused me to renegotiate the contract with the licensing company, which was successful after I showed them my research into the market place and how the product was gaining market acceptance. 2) The key issue that made this memorable was the fact that we could have lost the license for non-performance. However, the performance measure was set by the licensing company and it was their "best guess" at what could be acheived, not backed by all of the research I had done. 3) I was successful in negotiating a revised contract that had a slower growth rate than the one forced upon us. I was successful because I had the back up of my research into the market size, the portion of the market that each of the existing competitors held, and my strategy to exploit the holes in each of my competitors approach to the market place.</p>
221	<p>1) We may have planned for a daily scheduled in-house, non-promotional marketing activities to generate leads. However, we encountered several differences in the way we deal with prospects from diff. industries. Some industry appeared costly to do prospecting while others are very easy, even if we are selling the same service to them. 2) In every marketing activity we do to generate leads, we make sure that we generate the particular or safe number of prospects given the time and budget. Even if a particular client profile appears profitable but takes so long to develop its business, we think twice about it. The reason being is that the sales team's motivation diminishes over time as they get rejected over and over again, losing their quality of client profiling. What we did was turn our efforts to market to less profitable prospects with easy access so that the sales team will feel more and more motivate as they begin to close accounts one after the other. 3) In our case, it was successful. We saw that the less profitable prospects take less time to close so they close more given the same amount of time trying to win high-profit prospects.</p>
223	<p>1) We planned on using temporary staffing, but discovered they were not able to explain the service to an acceptable level. 2) After listening to the temporary staff explain the service, we discovered the issue. 3) Due to low attendance at the event, our sales numbers suffered.</p>

224	1) We started with the plan to provide basic services that were the core competency of the business currently. In this process, we found that the market was so highly competitive and offshoring so prevalent, we had to divert our efforts in a way to capture the market at another angle. 2) After numerous attempts with doors slammed in our faces, we developed a strategy to offer a service that they desperately need in order to obtain the services we were known for. 3) The outcome was we secured many contracts this year 3-10 million dollar contracts with the new service as well as the existing services we offer.
225	1) we target the smb space but had a unique opportunity to bid and win the business from a fortune 500 company 2) we had tried unsuccessfully to win this account over a period of three years. / / we won the deal because we really listened to the customer and committed to be brand agnostic in the selection of technology. 3) we have a committed contract for \$300,000 a year at fairly good margins and a chance to double or triple the business by adding other locations from the same customer
226	1) When the plan came first into focus we did not take into account the immediate impact the introduction of new product line being introduced into / the market. / Almost shortly after we had let it roll out we saw the risk we were facing / from the emerging competition of new entrants due to the attractiveness of the business. / we were therefore forced to go down the planning stage and lay new strategies. 2) The major city which was focus of our niche is known of being hotter during / summer and most of its workers had wanted to have something they could take / to cool them down-confectioneries. / These confectioneries were to be found in our new stalls before we got shock of new entrants who opted to make delivery to their office door steps. / we therefore had to review our distribution plans to cover neighbouring cities as well in order to maintain the volume at the same time reach new customers. 3) the move was a success as we embarked on new promotional drive while making some customers speak for us
227	1) When we were executing the go to market, market, we changed the order of the market priorities due to an unexpected market opportunity. 2) The American Heart Association listed the product as a Class II device which is the second highest must have rating. Based on this we focused on AHA implemented markets. 3) Still working the market. It has gone very well based on the uptake in the market.
233	1) customer wanted to target new group of clients 2) my customer's clients actually went for the product but bought it only during 2 month period 3) it was successful as clients bought several real estate properties
236	1) In the year 2007, I was running DRTV (Teleshopping) business in Albania. / Due to an energetic crisis, there was power supply reduction from 6 to 12 h/day in capital Tirana and up to 18h/day over the rest of the country. In such circumstances it was imposed to deviate from both BP as well as from MP! 2) During the incident I started cooperation with local licenced TV stations among national ones. The reason for this lays on: local TVs could be contracted with extremely lower price; it was possible to contract TV time that shifts power reduction itinerary, so people can watch our TV adverts. 3) During the mentioned incident it was successful we avoided bankruptcy and, among DRTV channel we started developing other sale channels, e.g.wholesale, retail and internet sales!
241	1) our main supplier closed up his factory. 2) we had difficulties to find new supplier and we had to make some correction to the line of production 3) Our plan got 8 month delay and we haven't achieved the original goal.

242	1) plan daten umsetzung in praxis is heavy there to itself around new inovation acts 2) we redefine costumers anew, because quite new customershas responded to ours product 3) after chance had we follow now steadily rises
243	1) react to survey on client needs 2) clients identified need to adapt 3) adapted service
244	1) Sales did not reach planned levels 2) Board meeting identified problem and requested immediate solution 3) Instituted a radio campaign to fill perceived gap in the plan
245	1) Switched primary market niche due to market conditions 2) substantial downturn in market necessitated shift to new, more focused niche 3) Partially successful - notably more successful than had I stayed with original plan
246	1) The company allowed internal issues to supercede the plan and we lost focus. We did not review the plan on a regular basis. There were staff changes after the plan was written whihc contributed to the above. 2) Important things that were planned for were not executed. 3) Our objectives were not achieved.
249	1) This was my first marketing plan for a new consulting business. Two months after i started, I noticed that a particular service was overtaking my time as compared to another service, so my marketing focus had to change. i have not rewritten my plan yet, as I've only been "open" for four months. 2) People are not taking me on as a Trainer (service), but more as a consultant. I now am focusing on how to expand my marketing better for my consulting clients. 3) So far, so good. The ultimate goal NOW is to retain these consulting clients for a year at a monthly fee schedule accepted by both of us. This is more < what I call) Internal marketing, ie. how my forms, conversations and general feel of the experience can further the relationship in the long run. NOT so much changing my marketing efforts, yet.
250	1) We decided to offer wine tasting at our home on the weekend to provide an atmosphere that was not present at the usual location as a beta test. We found that because of the rain in the Pacific Northwest customers generally want to be in a cozy atmosphere such as their homes. 2) The customers enjoyed it. We included videos of wine vineyards and on our big screen in our recreation room which is also where the tasting bar is located. They felt "right at home" as many of them stated. 3) So far we have been doing it only on Saturdays and during the Winter season. It has been somewhat successful but we are not sure of the long-term prospects of including our home as a part of our business in wine education.
251	1) We had intended for our new product to be released on a specific date, so the plan was based on this predetermined date. The product release was delayed a couple months and our advertising and marketing was already set in stone, which is kind of a problem b/c no one is going to remember the campaign 2 months later if they never saw the product. We implemented some ad-hoc activities to continually reach out to our audience during that timespan. 2) It invloved a lot of work in a very short time. Everything went well and people continually signed up for webinars and product trials. We all know money doesn't grow on trees, so the hard part was finding some at or near no-cost activities. I have found that educational webinars, which are pretty much free (except for the time involved), have been a fruitful activity. 3) I would say it has been successful so far. We're still evaluating the process (unfortunately only as time permits). We've had a decent number of companies migrate to our product.
254	1) Advertising. Budget was cut to 0. 2) Made the review more difficult 3) Had to rely on no cost advertising.

256	1) Based on entry into a new market we re-aligned the product mix to what we had learned about the customers in that market 2) The deviation allowed us penetrate a market much more effectively as we measured the actual attributes and buying behaviours of these clients against our pre-conceived notions and could make a direct correlation to the outcomes. 3) It allowed us to be successful with that client in the new market and then word of mouth got us business with other business in the same market using the same approach.
257	1) Change in top management created new priorities and direction for the company 2) Re-worked budgets and forecasts in line with new priorities 3) It is too early to measure the outcome of the incident.
259	1) feedback from customers, standard voice of the customer research 2) customer interviews and focus groups confirmed actual value proposition which was slightly different than my client's perceived value proposition 3) redeveloped the message in terms of benefits to the products
265	1) Largest Customer became impossible to satisfy on wholesale level so we terminated relationship 2) They decided to pay less for service provided which we had been made aware of before contract was signed so we put in an escape clause 3) Successful ...we went out and replaced with 6 clients
267	1) new opportunities presented in media, and new products offered by client. Client found new market opportunities for expanding product line with great potential. New media opportunities become available that requires allocations to be shifted. 2) Used more direct media, email's to promote new products more directly. Excellent results. 3) Increased direct sales of new products and produced new leads and sales for existing products as add-ons to new products.
268	1) One aspect of the plan was advertising, which became very expensive and did not have time for some new creative advertisement. So I stop. 2) The advertisement did not give the expected results. 3) Unsuccessful
270	1) Production delays caused reanalysis of selling season. 2) Simple production delays 3) Missed Christmas season so sales were not as high as could have been.
272	1) The media selected for generating leads was under performing our expectations, so we cut that particular media and replaced it with one that was performing. 2) All promotional activities are tracked and measured and based on whether or not they perform up to or above plan, they are either left alone, dropped, or modified. 3) The under performing media was successfully replaced with media that performed up to plan.

273	<p>1) The product development program was running behind schedule. In order to release a product to the marketplace some key features and specifications were delayed for later launch. The marketing plan needed to be adjusted to reflect the lower feature set release and needed to be geared to a second launch later in the year. 2) The project delay was communicated to sales and marketing after the initial wave of marketing material was released to the marketplace. New collateral needed to be developed quickly and sent to the sales channel as well as to the anticipated early adopters. The original marketing budget was exceeded by approximately 60%. 3) The marketing budget was exceeded by approximately 60%. The expected product sales ramp up was pushed out by more than 6 months. The marketing plan revision was successfully implemented however it is too soon to know whether we were hurt in the marketplace by the delayed and two-step product roll-out.</p>
277	<p>1) Cost of promotion and timing of expenses. Not matching the cash flow of the whole business. Had to be delayed 2) The manager committed the company to purchase promotional space, according to budget, but the cash flow timing forced us to renegotiate with the supplier to avoid higher costs due to delaying the purchase order. 3) It came out well, but the timing of the promotion, due to the delay was a little bit off the ideal target and some opportunity audiences were lost. / In the end, the marketing plan had to be in sync with the whole company cash flow, otherwise these kind of things will repeat inevitably.</p>
278	<p>1) It was a fully planned POS marketing strategy that was supposed to feature entertainment however it all changed when the chain of stores we were supposed to go into canceled our promotion through some practices that were less than ethical 2) The way we ended up moving the product despite the incident through alternate methods of promoting it 3) It was very successful we changed our venue to the street adjacent to the place we were supposed to have the event and became a very successful strategy</p>
279	<p>1) Our last project was a mortuary and funeral services house in Mexico City targeting low income level people. Staffing right people is quite hard in third world countries. It takes time to find them and testing right profiles. Lack of discipline and commitment is also a big trouble. Last time took me more than 7 months to hire right people. This caused a high increase in our expenses, schedules, etc. 2) Most of our original strategy was to have yellow pages, four types of brochures and radio spots. As we spent more time in staffing and hiring, we had to have to do direct street marketing by flyers and by visiting medium size factories asking a chance to talk to their employees. 3) Yes. It was successful and very stressing. We achieved our break even point in month 3th. To potential customers it was better to have a direct contact with our people delivering flyers than to take a look into yellow pages.</p>
280	<p>1) the ad budget and sales process 2) ad budget was cut and sales process altered to let sales do more with it. 3) Did all promotion of the pain through direct mail that we developed and sent. Developed a plan to help sales understand a process to send out information about our new product and service.</p>

282	1) When the major competitor in the market lauched a \$1 million raffle for its products. This was a major challenge because because almost all the consumers were asking for the product of the competitor because of the moneys involved with the hope of winning the raffle whiach had on it 5 new motor vehilcles and some good amount of cash to be worn. 2) All the consumers opted for the highly advertised product because of the prizes to be won in the competition. / / It made our sale team work extra hard because they had to run up and down to put up some adverts on our products and change a few strategies in our marketing plan. / / 3) We managed to win a few share of the market but not as planned becasue our competitor had invested alot in marketing and sale promotion for their products. / / We have learned some lessons and have grown in our operations with an anticipation to aome up with a similar strtategy ny investing alot in marketing as our competitor did.
283	1) A big gap between the sheduled test lauch and the actual launch period because of the technical department shifted the chances of us being first movers to early movers and this led us to re-survey essentials 2) re-survey results threw up a few entirely different (positively) level of awareness and wants among the earlier TA. It also gave us 4 new sets of TA categories to be focussed on. 3) Yes the re-worked strategy is still effective after 7 months and giving us results at higher levels than expected
284	1) Appearance of changes in behavior of the market and directions consumed 2) Change of the services came progress to customers of the company 3) unsuccessful
286	1) Competitor creates/launches new products / new strategies. 2) When competitor made a guerrilla attack, we have to modify our strategy and counter the attack. 3) We succesful to counter the attack but our marketing strategy can't run well.. We fail to achieve the target.
287	1) Deviation due to: / 1)Change in marketing strategy / 2)Change in Market scenario / 3)Pricing difference 2) Competition was high due to significant pricing wars. Consumers wanted new products with better quality & evenly priced, this would hit our bottomlines. Hence we devised a strategy to segment our market/customers & position our product accordingly. 3) Useful
289	1) during our leads generation process 2) w had a problem qualifying the list for the telemarkting process 3) Instead of simply acquirig list to do telemarketing, we simply diverted our activities to events in order to generate highly probabale prospects for the leads generation. It was successful.
294	1) New investors require more information on its product and services, especially revenue and P&L forecast. / 2) We had to request all supporting departments such as sales and marketing, corporate planning and production, to furnish more information on product costings and gross profit. / 3) It was successful because investors begin to see its market potential and its ROI.
295	1) One incident was that I introduced another product unknown to the market. They became curious and bought one to test i. 2) The market were amazed of the product I introduced. 3) It increased my productionline for at least 3 months

296	<p>1) The business climate changed and we were not able to legally execute some portions of our plan (signage). In another situation, we found that one avenue of marketing worked so much better than we thought that instead of taking the risk on another medium, we stuck with the one that was producing results. 2) We got calls from the city, from neighbors, and from other businesses complaining that our signs were in violation of city ordinances. We discovered that they were not indeed in violation and that there was no fine for placing signage where we placed it (yard signs). The campaign was extraordinary effective and we kept doing it until the city changed the law to "outlaw" our strategy. Pretty memorable as it was in the news for over a year (which only continued to help our business believe it or not). 3) The outcome was that we looked at the benefit of the marketing medium and saw that it outweighed the consequences. The launch of our business was state-wide news and we are one of the leaders in our category.</p>
298	<p>1) Things change so fast that by the time you complete a plan 40% of it is obsolete. One has found himself on many occasions not considering the exigencies of business that does not come from marketing efforts described in the plan (networks, old/past clients, family members, former classmates, suppliers etc) 2) Too much planning can make one underestimate the value of your immediate networks and our case those people with access to opportunities but not working for the company. One had to make room for "other commission paid" in the financials 3) High successful, one had to therefore accommodate this aspect in most marketing plans going forward</p>
299	<p>1) unforeseen obstacles with our existing customer base and their fear that we were going after their customers, which we were, and had to abandon an ad campaign and pioneer the soft sell. we pioneered the selling of our service B@B in face to face settings marketign the new value proposition. we met face to face with existing customers that this was actually good for them that we were growing our menu base to offer full idea (design/research) to tooling at our facility in US and UK. 2) just the reaction on their faces that our new division would bring them more business and they wanted to get on our list as preferred converters! 3) our new business unit (Leverage Industrial Design leveragerandd.com , rdtool, and rdprototype) now offers brand owners (P&G, Cadbury Schweppes, SCJ, HEINZ etc..) and one stop shop for their structural bottle development. We can manage and build the brand equity and operational goals including that the designs are creative and brand positioned for success AND meet manufacturable goals!</p>
301	<p>1) We manufacture aerospace components. Developing trust with customers takes a lot of our time. One of our marketing plan objectives was to contact other companies who were similar to the customer base we have now. Once we began contacting new customers we discovered that we could put similar effort into existing customer base, and just expand the % of business we were getting from them. 2) While having a conversation with a couple of different existing customers, I found out they had some new projects that I was unaware of. These new projects were not being discussed by the purchasing managers we usually deal with. We noticed that in both cases, with 2 different customers, that we needed to interact with people other than purchasing agents or materials mgrs. We needed to be conversing with project managers and engineers on a regular basis. 3) We pulled back from our efforts with new customers. We put the effort into our infrastructure and customer service with existing customers, as well as on time delivery. We spent more time talking to project managers and engineers about upcoming projects. We were able to increase our business by 34% over the year before without more employees, or new customers.</p>

303	<p>1) We were launching a bunch of new products across 22 markets or countries in Sub Saharan Africa. So naturally a "one -size fits all strategy" would not work. Had to fine communication across each market. Above the line advertising may work in South Africa but when one goes to Uganda it more of below the line etc. Electronic marketing would be virtually non existent in most countries except South Africa , Kenya, Nigeria and to some extent Zambia and Uganda etc 2) As detailed above there are challenges in media buying and placing adverts in Africa so we had to employ various agents in some countries at highly exorbitant budgets. 3) We were largely successful across the board in building awareness for our new products but activations or sales conversions were a different cattle of fish !</p>
305	<p>1) / Part of the promotion plan had been to develop a marketing brochure. Along the line, financial problems led to the termination of this activity. Dwindling revenues were cited as the major problem 2) / What made this variation from the plan was that a lot of ground work had been done - the advertising agency had completed all its work and we were all set to go for printing when then bombshell came. What was more, we had not produced any brochure for a few years. 3) / We had to attend two exhibitions without the brochure. We produced a makeshift writeup of our services and printed several copies on A4 paper and used this as a substitute. Needless to say, it was not up to scratch - there were no pictures</p>
310	<p>1) Due to poor planning, web development had to be delayed by up to a year as overspending in other business departments resulted in the business being incapable of setting up online purchasing, this caused the changing of majority of our marketing campaign, further web development and promotional strategies . 2) everyone was unsure of the up coming job roles as plans and promotions were already set to take place in the up coming months. 3) It was unsuccessful as we lost a percentage of market share due to user friendly competitor sites with full online functionality. Within our industry it is vital that we stay abreast of technology.</p>
313	<p>1) /we found new market segments along the way. We also found we were redundant in some of the agencies we were working with. 2) Some of the agencies, departments and individuals we worked with were in or had dual roles. 3) We saved time and material during the presentation to these groups.</p>
318	<p>1) The cost of Yellow Pages advertising for the coverage area increased significantly. 2) Some very tense interactions with the sales staff at Idearc (Verizon Yellow Pages). 3) We slashed the coverage area for YP advertising and diverted the funds to other media including local internet directory entries. The strategy worked as well if not better than YP in terms of lead generation.</p>
320	<p>1) The market was not ready for the new product and we had to start some grass root marketing to create the market trust. 2) From resource we thought our target market was ready to be early adopters, but few were ready to purchase. Need more information to trust the product. 3) We were about three years early and we are making adjustment now as the market is much more aware and ready to move.</p>

321	1) The plan called for re-directing advertising funds from indirect space advertising to direct mail. At least half of the space advertising was going into magazines that, in all probability, would not and could not reach important decision-makers and influencers; whereas direct mail could be specifically targeted to the most likely who could purchase or influence the purchase of the company's products. 2) The president of the company's advertising agency advised the VP Sales against making this move. However, the advertising guy's view was dictated by the fact that his commission level would go down as a result of this decision. 3) In the end, budget cuts forced a sizeable cut-back in space advertising, which, in turn, demonstrated to everyone's satisfaction that cutting back on space advertising had no influence whatsoever on sales results.
323	1) There was a change in philosophy about which product to promote due to competitive forces in our community. 2) Just the short rush of time to change gears and move in the different direction. 3) Yes it was successful. We were able to open up 300 new checking accounts.
324	1) This was a family business where a family member was trained to manage the tailoring business and carry out training of young people for payment. The trainer would raise the funds and not account for them, the trainers some of them thought the training was free and expected to be paid training allowances. I had to change the approach by discarding the training bit and concentrating more on tailoring which is not bringing in the resources I had anticipated for. 2) I lost a lot of resources, after buying the training machines and cannot possibly sell them to recoup my input. 3) Still trying to change the strategy and possibly get back to training with different management/training team.
326	1) We were going to launch a targeted investment campaign for investors focus on our small cap offerings and and given market changes and investor appetite we had to broaden our campaign to included a more diversified approach to investing. 2) It was a reactionary effort on our part to broaden our campaign and we learned the importance of not being too narrow in scope. 3) It was a successful campaign except for the level of detailed sales feedback was not as high as we had hoped.
327	1) WHEN THE MARKETING GUIDELINES WERE CHANGING ON A DAILY BASIS, HAD TO MODIFY MY PRODUCT MIX. MANY LENDERS WEN OUT OF BUSINESS, MY TOTAL BUSINESS MODEL WAS CHANGING FOR ABOUT 6 MONTHS. NOW THE GUIDELINES ARE CHANGING BECAUSE OF THE SUB-PRIME MARKET STILL NOT SETTling OUT. 2) DURING THIS PERIOD , A LOT OF LESSONS WERE LEARNED AND MY GOALS WERE CHANGING IN KIND. INITIALY I WENT FOR ONE PRODUCT BECAUSE I FELT I HAD AN EDGE ON THE MAEKET. HOWEVER, DUE TO THE INCIDENCE OF A DECLINING MARKET , THE HOME VALUES BECAME TO DECLINE AND EQUITY WAS BEGINNING TO ERODE. I WAS THINKING WHAT PRODUCT CAN BE A HEDGE AGAINST THE DECLINING MARKET? THIS TOOK TIME AND ADJUSTMENT. 3) IN 2008 I BECAME TO START MAKING MONEY SLOWLY. WHAT I FOUND IS THAT I HAD TO INVEST TIME AND MONEY IN EDUCATION. IN MY OPINION , IT IS THE MOST EXPENSIVE WAY TO GET INTO THE MARKET. DESPITE OTHER INSTRUMENTS, LIKE FORECLOSURES, SHORT SALES, REO'S, LOSS MITIGATION PACKAGES RESULTED IN LONG TIMES TO CLOSING A DEAL. AFTER CHOOSING THE PRODUCT , ESTABLISHING A STRATEGY, I HAVE GRAVITATED TO FIVE DIFFERENT METHODS IN PROSPECTING THE RIGHT VEHICLE AND ESTABLISHING THE LENGTH OF THE CLOSING CYCLE. THE PROGRAM WAS NOT ALL THAT FLEXIBLE IN PLUGGING IN THE NEW CHANGES IN THE MARKETPLACE.
336	1) the givewa ways there where not anouth 2) had to go and buy the the cd,s and shirts 3) worked out

337	1) We were forced to delay a launch date of the product due to the fact at a critical moment when we were trying to get an international certification, we found out that the conditions were changed from the original parameters. 2) We were to send 10 product units, but when we submitted to the certification center in Europe, it was changed to a minimum of 30 product units. 3) We are currently providing to the examining body 30 new product units for certification..
338	1) A sales of inventory wasn't planned initially 2) We made a special offer in the newspaper 3) It was successful
339	1) Because of a merger with another company 2) Suddenly we had 4 different countries after the merge so we had to adapt the plans for this new scenario 3) It was successful
341	1) Information about our macroeconomics factors such as exchange rate value really had a great impact on our plan. In the last 02 years and in most recent days, fluctuation of dollar related to our national currency has changed the plan. 2) Made us to rethink about our way to establish a price level policy, which must be reviewed from time to time. 3) As we sell our products in the medical sector, quotation made at that time is confirmed few months after, which give us a hard time cause prices varies in accordance with the international currency most used in Brasil (dollar). Brasil has not adopted any exchange rate control and therefore every dollar sold in order to convert it into real gives us less money back. This is because real is getting more strong against dollar.
342	1) Plan did not fit into circumstances surrounding client goals and needs. Was not able to generate/stimulate client interest. Needed to send clients something to make them take note of the message I was trying to get across. 2) After reviewing what I was doing I realised I would probably also throw the letter I sent away as it did not do anything to make me read further on. 3) The outcome was to shorten the letter, have a BOLD heading and message that grabbed the clients interest to read on and be brief enough in detail to make the client want to know more.
343	1) Sometimes you have plan your action plan and marketing strategies. Suddenly without notice the government or authorities change their policies which totally discard your earlier plan strategies even though you have conducted PERT and SWOT analysis. 2) For example here in my country formation of companies either private or limited is governed by The Company Commission. Individuals can either form on their own by lodging the required forms or make use of the service of management company. This has been going for almost 40 years. The revenue is lucrative. Suddenly the Company Commission change policy by not allowing management firms to conduct company or business registration. The individuals have to lodge on their own. There was a loss of revenue for the management firms. 3) Of course we have to quickly diversify and look for new service industry to turn to. Now we are providing training programs on motivation, soft skills etc
344	1) The market is shifting rapidly and new opportunities to put the product suite in front of decisionmakers presented themselves. We added events to the tactical calendar. 2) By being very strategic regarding our spending at meetings/events early in the year, we were able to add events to the calendar for Q2 and Q3. While we were strategic in our sponsorships, we were still able to get some big bang for our spend. Also, selecting events where we had some champions helped us to spread the word and the champions are well regarded in their local community. 3) After learning of an influential group that was negative towards the product suite, we offered to sponsor events at their annual meeting, meet personally with KOLs and invited several influentials to join an existing industry board. While you can't say that they are enthusiastic about the product suite, they are now more open to discussing it and at least acquiring to using it in niche situations.

347	1) / ceo request 2) new service, shotgun approach no real target 3) difficult to measure - created awareness
349	1) - weakness of the service provider. / - weakness of customer support. / 2) - the product was internet through WIMAX technology, unfortunately the covering area was 30% of target area and the plans were not correct and always we face with the customer a problem on disconnecting when he browsing and the bad signal, and we he contac 3) due to this problem the provider freeze the sales temporary tell he fix the covering area and to buildup the requalifide service center.
360	1) a competitor offered a price reduction on virtually the same service we offered. 2) This was a drastic price reduction. We had to look at our services, rethink our charges and look at other services we offered as a differentiation. 3) We did a direct mail piece explaining a new (our first) bundle. We kept most of our customers and increased the number of services they used.
361	1) A decision to create fliers and do cold calling to generate business was, when the plan was written, seen as the best way forward. Before the plan was fully implemented it was seen that more could be achieved by delivering video e-mail with a follow up phone call 2) During the early days of plan implementation it was discovered that geater efficiencies could be achieved by changing my approach 3) Greater feedback was achieved with more positive outcome was pleasent to witness
363	1) a new competitor entered the market 2) significant shift of business to try new provider 3) temporary erosion, halted then reversed by an aggressive counter campaign
365	1) A new market opened for an existing product that we had not anticipated. This required coming up to speed on this market, needs of user group, purchasing procedures, product benefits to this market, etc. 2) The overwhelmingly positive response to the application and its immediate benefit to the client group. 3) Growth within the market and immediate purchase decisions. Willingness of new clients to promote the application to colleagues at other institutions
366	1) A new market opportunity & new set of rules & regulations 2) Different versions of legal framework forced us to review our pricing the services. 3) The outcome was successful.
367	1) a new middle east market opportunity came along that we had never foreseen and therefore it needed to be incoprated in plan as it was a major item 2) it was during a conversation with 1 of our customers that he mentioned he was getting involved in a new country, i then asked him more about it and if we could become involved 3) so far it is early days but believe in next 12 months it could be significant and more detailed planning will be needed
368	1) a new oportunity came along that changed our entire plan. We have been looking into getting into lawn care for three years now and have gotten close once. But we unable to attract the right person. 2) i recieved a phone call from a close friend asking me to look at equipment at a golf course that was closing its doors. I ended up hiring the greens keeper that was going to be out of a job sortly. So far it has worked out alright. 3) Not shure yet will take more time.
369	1) A new opportunity came up that I had not planned for - a trade show. Had to change the budget 2) Not know yet - have not attended show. 3) Unknown

370	1) a new product was launched with similar indications. We did not have enough intelligence to foresee this coming. / 2) we had positioned our product as the choice for that particular indication as no other was available with such an activity profile and after that we had to work on the presentation form and on the application form in order to make it again unique 3) in the end we are extremely successful because our product was perceived as a medical act during its application while the competitor (even with a slightly better profile of action) was not perceived as a medical treatment, was just another treatment.
375	1) Actual Real Estate industry and mortgage guidelines affected my plan. 2) Value of properties decline and mortgages are higher than the value of properties, also qualification of buyer change. 3) If the macro economy change, the plan and strategy change.
377	1) Additional services were being requested. 2) Developed new service package 3) successful
381	1) An email campaign was supposed to be followed by a phone campaign but the latter was delayed until our product could be more fully developed. 2) The email campaign had such a negative response that I decided to postpone it until another time. The incident is memorable because it was recent. 3) The phone campaign will be implemented in the next few weeks so I can't specify its outcome.
382	1) An unexpected opportunity became available 2) We were contacted by a community organization that was attempting to have major builders commit to doing business with community based businesses 3) The deviation was successful as we received a significant contract that will double our projected income.
383	1) Arrival of new competitors 2) Almost similar launch of competitor's product 3) margin pressure, lower budget
384	1) As a Chief Investment Officer in Nigeria's Investment Promotion Agency, we offer frontline services and facilitate investments(FDI) in the country and do image laundering promoting Nigeria as a preferred destination for investment in emerging markets. This is no mean task with the perceived international(mind set)image of the country. / / Challenges occur mostly at the budgetary level as government allocation is usually grossly inadequate. 2) Oversea direct marketing services we call (BIF)Business and Investment Forums, this time in Canada 5th - 9th november 2007. / / The request was presented by the Canadian trade office in Nigeria to do an awareness campaign in Canada with recent increased investment by Canadian in the Oil and gas sector in Nigeria there arose the need to do an image laundering and attract more quality canadian investors in other sectors in Nigeria like mining. / / The planning got into a hitch as the US dollar fell at the project execution stage, and funds packaged under PPP public Private partnership / dwindled. / Another area was the stringent visa requirements of the Canada consular section, as many participants had not been granted visas to attend the event in Canada, as such critical private sector that is the growing Nigeria's medium class that was wiped out in the military era could not be showcased. 3) / The event was successful as the offshore strategic partners were able to lend a hand mostly in mobilising the local business community and in sponsoring some events and other logistics. There is also an enthusiastic feedback from there. we also learnt that the group of 8 countries are quite expensive in doing event like these.
386	1) As a small business, the normal interactions with customers tend to swamp us. Despite having a long-term strategy, day to day tactics just obliterate it. 2) nothing dramatic. Scope changes and all of the sudden a six week project becomes a six-month project. It's considered fine because you're getting paid more, but there goes the strategy. 3) Got more money from existing client, didn't spend money getting new clients. But now you are more dependent on that ONE client.

387	1) As part of our marketing plan, we had made a decision to form a strategic alliance with another company to expedite the delivery of our product to the market, taking advantage of existing marketing channels to save us time, and more importantly money. 2) The company claimed to be a responsive, proactive company. We assumed this to be correct as they were a more successful organization than we were. As the relationship progressed, it became clear that the pace in which they implemented the program was much slower than indicated and much much slower than we were satisfied with. 3) It was successful for us to sever the relationship, and we developed distribution channels of our own. The down side was we had more expenses, the upside was we had significantly increased sales that more than made up for it.
389	1) Available budgets changed and we had to respond. On another occasion a competitor launched a product which required that we reconsider our messaging. 2) See above. 3) We worked around the budget issue by changing our plan of attack re: market research. Re: the competitor issue, we made both product changes (attributes) and messaging changes (feature/benefits and some branding changes).
391	1) Because of the need to revitalize the product specification which suits to consumers especially the packaging criteria. 2) Poor packaging strategy made us to revitalize the same in a rejuvenated form. 3) Yet to ascertain the outcome.
392	1) Budget adjustments or identification of market forces that required adjustment to the plan 2) The investment we planned needed to be cut back due to investment needs in other sections 3) Successful in the area we shifted investment to, unsuccessful in our plan for areas where budget was removed.
393	1) Budget changes and inaccurate forecasting forces us into reactive mode from proactive mode. At which time we are normally looking to scale back the projects, causing a snowball effect. 2) Our 1st qtr projects were off by 30%, causing the company to scale back vrs increase marketing and project efforts. 3) The outcome was a project that generated less leads, causing less sales, and a lower gross profit and percentage to goal.
399	1) business focus changed so the plan had to change with it. 2) Networked with medical industry - not something I had thought about 3) this is where a majority of the profits come from
403	1) Change in market expectations 2) Change in practices to accommodate a major customer's requirements 3) Mutual agreed performance and product alterations
407	1) change of business location which caused new demographics and situations. 2) it really went smoothly. With some new numbers and a few details switched everything fell into place. 3) it was successful.
410	1) changed focus from Japanese service provider management and went directly to business customers of service provider 2) realized that Japanese service provider was not totally committed and did not understand critical benefits of our services 3) no sure, business volume growing, but too early to tell

416	1) Changes were made in an attempt to adjust to very slow response by key advocates of the service provided. 2) The head of a department requested the services offered, yet once offered, failed to promote the service as needed for success. Change in the marketing plan was necessary; the original objectives revolved around the promotion (through education) of the services by this department head. Without this critical component, the plan would fail. 3) Other potential markets were defined; promotion plans shifted. Elements of the original plan continue to move very slowly causing implementation delays; the success of the newly designed plan has yet to be determined.
417	1) Changing economic conditions led to the delay of a promotional campaign that I had considered launching. 2) The rising cost of transportation services has caused my (potential) clients to be weary of investing in additional services. 3) This has not played itself out yet. I am currently envisioning a revised strategy.
419	1) Client decided to pursue an additional segment of the market than originally planned. He decided that the new segment would result in quicker revenue results with limited impact on operational costs. 2) The new market segment had been discussed as an option for a different strategic reason but had been deemed a long shot by the client earlier. His (new) change of mind and direction meant a re-positioning of the client's focus with new marketing materials needed along with different sales lead generation requirements. My concern was that he was shifting direction without much thought or preparation. 3) I developed new marketing plan components (new marketing materials, new lead generation system, etc.). However, it has been unsuccessful so far - client has found other reasons why this won't work at this time and so he has delayed the initiative for a few months.
420	1) Client feedback provided information for plan and course correction. 2) Initial sales feedback provided from sales team provided information to change marketing and pricing strategy. 3) Change in direction allowed us to sell more and provide different marketing plan with enhanced sales tools than originally planned.
421	1) Client would not implement production of marketing piece designed because of final cost to produce. Brochure was scaled back, re-written with focus maintained for key message. Client approved new format and costs. 2) Secondary product was actually better and sent more powerful message about the product. Enabled us to plan differently for future marketing piece and hone our ability to deliver a key message in a more reasonable product for the client. 3) Not sure, because it hasn't reached the target market yet. We will track the leads generated from this effort to determine if sales result.
422	1) company acquired new international businesses that required us to reevaluate the corporate marketing plan and evaluate foreign markets 2) The foreign buyers appeared to have different interests from domestic clients. While domestic clients assumed corporate stability and expertise because of the company's longevity and leading position in the industry, foreign clients were more interested in engineering expertise and specific problem solving capabilities. 3) Too early to tell if efforts are overwhelmingly successful. Initial indications, based upon sales generated in the new markets indicates that our efforts to reposition the company in response to their interests are working.
423	1) Competition from health providers in retail stores prompted us to increase our hours of availability and add more urgent care time slots 2) Several of our patients defecting to retail store health providers and they telling us how convenient it was. 3) Not sure yet but we seem to be retaining more of our patients

424	1) Competitive products were released to the market before our products. 2) The competitor's products included new features that we were developing. We had no data or information that they were doing the same thing as us. 3) We changed the product feature set impacting product definition and launch date and changed the process on obtaining competitive data.
429	1) Customer expectation did not meet the product expectation. 2) Product message did not connect with customers and they began to ask what terms A, B, or C have to do with the product. 3) We refocused the message using different terminology, which is now having a direct effect on the sales operations.
433	1) Decided to change the priority level on the geographic locations. Re-thought the priority on North America and Europe. 2) Had placed too much of a priority on North America and Europe. Decided to change that priority to South-East and South Asia area. 3) Was successful. It showed us that we must be flexible in choosing markets based on ever-changing economic situations, i.e. currency changes, economic slow-downs etc.
435	1) devaluation hit target country and all financials became useless. 2) client company execs were extremely cautious for 6 months and became paralyzed by event 3) we had to revise down financials and plan became a skeleton of the original plan
443	1) Didn't expect drought to be as impactful. Had to create a deviation to market perception of need of product. 2) Very stressful. However, it was exciting to see that drought and economy can be overcome with persistence. 3) Made plan.
446	1) Difficulty in financial situation, cut the budget for marketing 2) have to cut budget for website 3) not sure
447	1) Direct mail budget was substantially different due to postage increases and other factors. 2) Expensive. Had to cut-back. Affected whole plan. 3) Relatively successful.
448	1) Direct mailing did not elicit any responses after 2 months so I did not continue. 2) Follow up phone calls only elicited a response that they would "get back to me", usually through a third person (gatekeeper). 3) Unsuccessful immediately but I consider these contacts are still "alive" but will require a rethink as how to engage these potential clients.
451	1) Due to budget changes with our customer, we had to expedite the delivery of products and services we had not planned for. 2) Our client asked for a complete change in schedules, and we brought out a product scheduled for introduction 6 months in the future. 3) We had to re-orient our internal production and sales efforts to concentrate on our client's request. There was significant stress, but we were successful, yes.
454	1) During the implementation meeting, the marketing manager told the Vice President that he didn't want "his" customers cross marketed by anyone 2) He got up and walked out and his flunkie followed him. I told my partner that my department will do it without him and I will eventually fire him for the insult. 3) Unsuccessful but my division of 35 people do not acknowledge his existence. We throw it in senior managements face every chance we get

456	1) Execution by the field sales team was ineffective because of a lack of direction by the team's leader and because the sales team did not possess the confidence and professional skills for implementation. 2) We modified the initial implementation of this commercial market development program so that all approach work and lead development would be conducted by the field marketing staff. Leads are forwarded to the sales team for closure. 3) This approach proved that this new target market was valid because we closed a number of new accounts. However, the volume of business was much less than we hoped because there was no field sales contribution to creating new opportunities.
458	1) Existing dealer needed to be replaced and a target market was awarded to a new dealer. 2) Existing dealer failed to reach their commitments. Terminated that dealer but word spread that the dealer was being terminated and a replacement dealer agreed to come aboard in the same week. 3) Successful. Replacement dealer proved to order better product, was financially stronger, better reputation, and better facilities.
459	1) External conditions changed, such as funding running out for a new enhancement that negated the need to do certain promotions for that new feature. 2) (BLANK) 3) (BLANK)
460	1) External funding reasons caused change of plan 2) No details provided 3) The focus of the services shifted which was not my original plan - I would like to go back to the original plan, but market conditions will not allow it for the next couple of years
462	1) Financing levels required changes in the scope of services that were available. 2) Couldn't reach the level of funds required to implement the plan as proposed. 3) Couldn't reach maximum penetration in the market due to reduced capitalization.
464	1) Funding not available as promised led to scaling back promotional activities. 2) Very stressful to create a plan with a certain budget figure in mind and then find out that the budget was not real. 3) Smaller scale marketing communications led to lesser customer impact and fewer distribution channels engaged with product
466	1) Had to buy POS system that ended up being twice as expensive as I had budgeted, but the POS system has marketing bundle included and is very flexible (MD Ware, from Salonspaware.com) 2) Nothing in particular, except I had to redo the budget accordingly. 3) Don't know yet...
468	1) Hiring sales reps - the plan called for 1. But the opportunity to hire 3 qualified individuals presented itself so we deviated from the original plan. 2) Hiring qualified sales people in the right locations is at best difficult. In our attempt to hire one we found three in ideal locations. 3) The jury is still out. Two of the three are on plan, the third is struggling. I consider it successful even if the third fails. It has significantly negatively impacted our budget, however our sales have exceeded our goals as well.

472	<p>1) I AM ALSO A MARKETING CONSULTANT TO A JAPANESE KOI FISH FARM OPERATION.DURING OUR INITIAL MARKETING PHASE, THE U.S. GOVERNMENT TIGHTENED THE RULES ON THE IMPORTATION OF KOI FISH FROM JAPAN. WE WERE REQUIRED TO CHANGE THE FORECASTED ESTIMATE OF FISH WE WOULD IMPORT FROM JAPAN. 2) THE U.S. GOVERNMENT TIGHTENED THE HEALTH INSPECTION REGULATIONS REGARDING THE IMPORTATION OF FISH, REQUIRING VETERINARIAN INSPECTIONS PRIOR TO AND AFTER RECEIPT OF THE FISH, ADDING UNFORESEEN EXPENSES TO OUR OPERATION 3) WE WERE ABLE TO WORK WITH THE STATE OF HAWAII VETERINARIAN OFFICES TO WORK OUT INSPECTION SCHEDULES AND IMPROVE THE THROUGHPUT OF THE FISH TO OUR FISH FARM.</p>
473	<p>1) I am involved with youth guest house business in Nepal. During the initial marketing of the business, I planned to market the business outside Kathmandu valley to target students and visitors who come to Kathmandu for different purposes. However, I never went outside Kathmandu valley. Instead we went to different colleges to establish a partnership for full board accommodation facilities for the students who are from outside of Kathmandu. So, there was a major shift from the original plan and target customers. The major reason for this was the financial limitations prevailing at that time. 2) I realized that my marketing plan was very expensive and expensive at the same time in proportion of the start-up budget and size of the business. For a start, the accommodation capacity was of 35 pax only. The plan is still there and we intend to implement it within the next two years as our business expansion strategies. 3) Of course, the last minute changes were very difficult to carry out specially because we didn't have much networks to look up to. We had to maintain the facilities for 7 months without any results. Now, the business is well. 50% occupancy.</p>
475	<p>1) I decided to make a directional change due to the cost of product entry for retail. 2) My original plan was to create a solid base built on retail i.e. Safeway, Alberson's etc but the cost of entry was so high I changed to private label and club. 3) successful we have grown 3X in the past 2 years</p>
476	<p>1) I decided to purchase air time on a radio station and did not refer to my advertising costs in the marketing plan. 2) It got very expensive and frustrating to focus on the ad because I was too concerned with the cost. 3) I did not buy the radio time because the cost was not in my budget.</p>
477	<p>1) I decided to withdraw from providing a certain service which no longer interested me since it was far less profitable than another service. I told my existing clients that I would no longer be doing this, and helped them find alternate suppliers. 2) A valued colleague recommended me for my previous service to a large vendor. I had never gone out to my network and told them that I was withdrawing from that service offering. So despite my decision, I engaged with the new client as a warm lead, and agreed to provide this service for them. 3) Well, I ended up doing the work and getting paid for it. So that much was a success. But I deviated from my plan to focus on another area, which is more profitable for me, so that was not a success. And now I am engaged with a new client who expects me to continue to service them, and I have not yet repositioned myself in the minds of my colleagues.</p>
478	<p>1) I had no idea how much I'd spend on creating relationships (lunches, informal meetings, stuff like that). I budgeted way too little. 2) I upped the budget in accordance with what I spent. 3) It was successful because the plan changed.</p>

480	1) I made some assumptions about who would be willing to purchase my services and I had to admit I was wrong and start over with new assumptions. 2) The money never materialized for the first idea so we had to regroup and try something more basic to the needs of our customers and build on that basic need. 3) We have been rolling now for three years with the retool, we are breaking even and beginning to move ahead with revenue increases. It takes a long time to make this happen, we must never give up.
482	1) I run a retail shop so a new shop was opened just next to mine so i had to make some changes to match up with the new changes 2) In our positioning, we positioned ourselves as the cheapest shop there so when the other shop was opened, they also used the same strategy so we needed to think about creating more space for our shoppers to move around undisturbed 3) The changes worked well and we survived the competition
485	1) I was surprised by regulations changes in our industry. Those changes opened up new possibilities of action and I'd to replan all over again. / Basically, all of a sudden the market changed positively, but in a way we only dreamed of. One difficult part of the job - talk about everything in a new way we were not used to. An then, set up a new plan. 2) It was very interesting but it caused too much work and a complete new mind set. It's very hard to explain the changes to the whole organization and redirect it toward new goals and, specially a new business mission. The most part of the earlier job became useless. 3) The outcome was very successful. The whole industry, not only our organization, grew. We developed new products and services, a new relationship with new partners and got new costumers too.
489	1) Implement a timed, staged and personalised direct marketing campaign to named business owners introducing a new service. Maximum 10 letters per week, with 72 hour follow up to identify clear prospects, reject interest only targets. Driven by need to generate new prospects and new clients, idea gleaned from existing client who had identified a good success rate with this approach. 2) Failure to implement due to time pressures on delivery of services to existing clients. Lack of clarity in the service offer, those initially approached did not understand the offer, could not differentiate my services from other providers, did not see the USP. 3) Unsuccessful due to poor implementation
490	1) Implementation date changed due to engineering resources. 2) Delayed by 4 months, huge impact to schedule. 3) Secured resources and met 2nd delivery date.
491	1) improved upon the text in the marketing letter to be more appealing to the target audience 2) the text related better to the target and improved the response rate 3) it was successful because our response rate went up by a measurable amount
493	1) In our plan we talked about the timeline for getting our marketplans rolled out to the staff. Our goals, had to be changed several times and extended. 2) I recall the staff not being flexible and will to roll with the changes. 3) Our board had a meeting and we set new goals and a better timeline that fit as many groups and teams as possible

495	1) in the consulting business where I work, unexpected situations arise continuously. The marketing plan called for increasing penetration of the domestic consulting market and decreasing operation in foreign markets; however, the domestic markets proved a tough nut to crack and foreign opportunities were available so for financial reasons, it was necessary to continue to accept foreign assignments 2) I recall having very low expectations of a trip to southern Africa ... instead I was pleasantly surprised by the country I visited, by the kindness and competence of the people and by the opportunities for downstream work there. 3) the outcome was a successful visit that may well lead an ongoing revenue stream in the future.
498	1) Industry demand picked up for services we had product inventory of - so we obliged to them. One was of refurbished lasers. Other was for semiconductor automation. 2) Top customers that trusted us asked us to perform these services for them. One being Intel. Another being a top Taiwanese company. 3) Very successful in that they will work with us on exactly how they want the services performed. And, to what specification. And, at what price.
500	1) Initially, the Marketing plan was based on sales that our sales team had projected. One of the problems was that they projected based on marketing. The bottom line was that the sales department based sales assumptions on the marketing plan which was based on assumptions by the sales team. Neither group had based projections on any other criteria. The result was having to cancel a number of trade shows due to the lack of sales. 2) We did trade shows as a method of introducing product and sales staff to the client world. In other words "marketing". The sales staff felt that the "quality" of the leads generated at the trade shows was not of high enough quality, therefore sales suffered. In retrospect, it might have been a self fulfilling prophacy whereby the sales team felt that the leads were not good - so they fluffed them off. in doing that, the sales projections were not meet. 3) We tried various other methods of generating sales leads that "were of better quality" for our sales team. As we tried various methods, (ie., telemarketing, direct mail, sales lists, etc.) we updated our marketing plan to reflect the new "MOM" (method of the month). We spent more time on the marketing plan then executing it.
502	1) Internal partner related conflicts cause constant deviation from plan. 2) Unable to execute plan due to redeployment of capital allocated a marketing plan. 3) Marketing outcome inconclusive
503	1) Introduction of a new competitive product 2) We had to review the priorities of the product development plan 3) We lost quit some sales, but we picked up our competitive position within a year
512	1) Largest deviation involved key staff person hired to execute plan. Was under performing, and separated from the company. Took one quarter to transfer operations load to reengage in plan. 2) All major marketing efforts ceased in the short term. Utilized low effort methods (mailings, emails, etc) to start back up. Then slowly reengage in face to face and higher effort methods for marketing. Most memorable: Poor hiring decision / need to more closely manage position. 3) We definitely lost momentum. Referrals have still been solid, so it is hard to say how much we actually lost in terms of lost referrals / customers. We continue to produce revenue above plan with quarter over quarter growth, and operate near full utilization.

513	1) IEGISLATION CHANGES INFLUANCED THE WAY OF DOING BUSINESS. / pRODUCTS NORMALLY USED SUDDENLY BECAME LOWER QUALITY AND WE HAD A RUSH OF CUSTOMERS REQUESTING OUR BETTER QUALITY. 2) cUSTOMERS STARTED WRITING US AND WANTED LONGTERM CONTRACTS TO MAKE SURE THEY COULD GET THE PRODUCT PRICE WAS NOT A ISSUE. 3) IT WAS SUCCESSFULL BUT WITH ALOT OF EFFORTS TO SHIFT MARKETS.
516	1) Lost key regulatory affairs resources to support product expansion project. 2) Higher priorities within the corporation ended up consuming entire available bandwidth of resources. Had to negotiate with senior regulatory management to gain approval to outsource needed skills. Achieved agreement contingent on regulatory management identifying and approving outside consultant. 3) Ultimately, attracted and hired outside consultant and achieved necessary outcome. Outcome delayed project 3 months.
517	1) Mailers were not working so we changed to email distribution. 2) Responses tripled. 3) Responses tripled.
518	1) Mainly work with publications, so when a ad does not work we change that ad. 2) No countable response from the ad campaign, so changed ads 3) More responses to the ad. Do not know how successful ad campaign for the client business was, the company never related that information back.
519	1) Major change in uncontrollable variables (foreign exchange issue) 2) Major price adjustments to compensate for higher relative prices in forign markets. 3) Successful. No loss of customers.
521	1) mareting strategy cled for promoting offers via web, email, brochure and print media. developmental issues required change in strategy to focus only fewer media and postponed weblaunch and email activities 2) memorable: / revised allocation of resources conflicted with promotiontactics activities. 3) ongoing efforts to recapture strategy while diminishing problems in website launch timing
522	1) Market changed, opening up opportunities in new markets. 2) Redirected marketing resources to investigate new market and prepared mini-plan to address the new market. 3) Successful. Visited trade shows to discuss research and market for product, and was able to direct marketing efforts to right decision makers.
523	1) Market changed. New competitors with same exact products came into the market as well as old competitors with knock off products. 2) We had to make adjustments quicker then planned an change our product mix. 3) It's ongoing. Successful in some parts and needs more adjustments in others. / I feel a marketing plan is an ongoing,moving object. Your have your core beliefs that should not change(basic business 101 concepts change: paradigm senergy but the heart of it doesn't). The market, competitors, products, sytems, are always changing so the plan has to be adjusted
524	1) Market conditions changed. Ownership of primary business changed. 2) The acquisition of the business necessitated a delay change in our ability to execute against the plan. 3) The plan is still a working document. The Company has a new CEO and head of Marketing. They are developing a new plan and utilizing the last one as a preliminary roadmap.
529	1) Most of our target customers are become netitizen by the hit of globalization .2) Buying habit of customers are dynamically change. 3) selling online is necessary to become market leader.

530	1) My business is based in Romania and my experience comes from the US. My business is real estate based and my experience is software based. Therefore my planning needed to be tweaked in places to match reality here. Therefore was a situation where we excluded some of our fixed cost. / I had to adapted some extra social situations not inked with my concrete plans which where included in the marketing plan. 2) I tried to apply the experience I had from my prevoius jobs in the US, but I ended up spending most of the time socialising as marketing is doneon relationships and bribes not on quality and offering. 3) Yes. We were able to reach a blend of strategies between traditional marketing and specific Balkanic strategies...
531	1) My CFO refused to give me numbers for history so it was very challenging 2) Without proper numbers... budgeting and projections was nearly impossible... but I did my best to guesstimate! 3) I had little to no cooperation with other department heads and thus the marketing plan was shelved.
532	1) My plan was promotion of copper applicatios in Mexico, specifically on copper roofing, during the frst quarter of the year the Intenational Miners Association (one of the most important sponsors and tecnical project directors)decided to suspend all promotion on cooper roofing on Latin America(it was 60% of the total budget. / / / / / / / / / / 2) We ahd to reassign funds to promote piping and electric wiring and cable copper uses, without sufficient time and market information, depite that those applications did not needed that kind of marketing support, they was covered by producer companies. / Then we went to previous market studies in order to redesign campaigns, and of course objectives ave been lost. 3) From the point of view of the mktg administrative distribution of funds at international level it was successful because campaigns were made as they decided, but I think that from the marketing point of view all thah money was lost. / / (sorry for my english)
541	1) New opportunity took me in a driection not in the marketing plan. 2) I relied on it and the follow on easy business without referring back to the marketing plan that applied to a wider universe of clients. 3) Both. I got a new client with easy follow on work for which I had to do no marketing. however, that undercut my initial plan, took me way off course, and left other potential opportunities untapped. I should have focused more on the marketing to otherw while I had the one sure thing--which eventually wound down.
542	1) New product development was an important part of the plan, but it has been significantly delayed by both internal issues and customer commitment (or lack thereof) in evaluating the new product. 2) Not yet finished - still in progress. Customer has renewed commitment and internal issues have been mostly resolved. Still, it is taking far too long to move to the next stage. 3) We'll see!
546	1) New sales data arrived that led me to allocate more promotional funds. 2) The sales forecast was way off. 3) We were able to capture the increase to sales.
548	1) Not enough budget to implement the ads and other marketing activities 2) poor budget planning and spent at the wrong place. wasted the money at the wrong person and wasted the time too. 3) need to review the plan and to top up the budget
549	1) Not getting good response to existing marketing and changed to more direct marketing. 2) Slow sales 3) Not sure, sales are continuing to be slow, but customer recognition is improving.

550	1) Not having the time to implement the plan. Pieces of the plan get done but not the whole. 2) General business needs interrupt the implementation. Not having the dedicated resources to carry out the plan. 3) We achieve part of what we want to achieve. How will we know what we could have done?
551	1) Once the complete due diligence was completed on the delivery cost for a JIT program showed the freight to cost more than the product. 2) Holding a series of meetings with outside suppliers and finding no alternatives to meet this need. 3) The program was scrapped.
553	1) One of our internal colleagues was unavailable. It was important that they were involved in the implementation process. However, we had to push on with other aspects and as such the marketing plan and its priorities needed to change. 2) The issue did not have too negative effect on the plan and once my colleague was available we were able to get the person up to speed and after a slight deviation, get back on track. 3) The plan was able to be delivered on time and the new internet functionality was implemented (with some late nights!).
554	1) One of the 5 business units was not achieving revenue and we need to shift resources to backfill the resources 2) x 3) x
555	1) Only in the event we get enough feedback to change. 2) We were offering a program where it gives sellers a guarantee. We would sell there home in 60 days or we would sell it for free. We never changed the message just some of the guidelines. 3) Now it's running very nice.
558	1) Our business is an internet record label. We started this before it became the "in thing". We were in the process of marketing an artist. At first we were against using traditional methods such as regular radio and standard marketing thought processes. However, that changed once we took a chance and hired a consultant. Big Mistake. 2) The consultant was a senior executive from a previously successful time period. He talked me and partner in to using his services and contacts. It became a disaster, we went way over our budget and the music video that was developed at the time we thought is was good but now after getting back to our plan and learning each segment of the business in bite size chunks, we have realized that we bamboozled. 3) the outcome in our opinion is not to hire consultants unless you have a specific agenda for them to follow and measurable metrics along the way.
560	1) Our Business out grew our Marketing Plan. From \$6 Million in Sales to \$35 million in four years. 60 employees to 140 2) New Markets 3) Not sure, we grew to big to fast
561	1) Our direction was diverted because of market demand 2) We chose a service that was more in demand. 3) It was successful as the company now will do over \$2,500,000. more in business /
562	1) our plan relied heavily on a key strategic partnership that didn't work out as originally planned. they did not meet volume/financial commitments that we were essential for the partnership's ROI. 2) it was in essence a lack of due diligence, commitment by them, and clear-cut roles & responsibilities when handling common client engagements. we did not exhaust the research process in order to find the best partner in our space who shared a common version of success, and our implementation plan did not receive buy-in on both sides of the fence. 3) we have not officially cut ties with this partner yet, however we have made strides to build up our own internal capabilities which cover a few of the partner's value-added services that originally attracted us to them.

563	1) Our script for soliciting was found to be frequently ineffective so we reworded our script to better engage prospects. 2) Prospects rebutted the claims we made in our solicitation script so we reworded the script to avoid or overcome objections more effectively. 3) More prospects became clients and sales increased.
564	1) outside competition forced a reactive change. 2) competitor targeted our client base and we reacted to counter the potential loss of clients and business revenue. 3) Changed service focus led to improved service offering to all clients and reinforced the original marketing plan objectives. This led to client retention and some increase in revenue in addition to the targets identified in the marketing plan
565	1) Part way into the implementation we determined that our prospects would be better (10 times the adoption rate) if we changed the delivery model of the product. 2) During development of the marketing messaging and marketing surveys, I had the idea to change the delivery to make it easier for the customer to accept and implement and having vetted the idea with product and financial people, we altered the delivery model and reworked the plan (and the schedule). 3) We have adopted the revised delivery model and product development is currently making the adjustments which are due for testing in March. The marketing plan has been adjusted (delayed) to the availability of the revised product. At this time, we still consider the changes to be positive and that the adjusted plan will be successfully executed.
566	1) Partner had to back out - conflict of interest with new day job. This is a small company so this affected our sales strategy. His work with outside sales is performed primarily with inside sales, web, email, and flyers promoting occasional training we provide etc. 2) This was to be a part time business for a few people. During negotiations of key line one of the partners had to back out because of a conflict with his new job. This has and will continue to slow the growth of the business. We are seeking a replacement. 3) Too early to know. We are in business and have profitable revenue but whether we are and continue to provide level of service required has not been shown.
568	1) Planned funding forced us to cut back on planned marketing. An "angel" investor dropped out causing us to scale back marketing. 2) We simply could not implement the plan as written. It caused us to revamp revenue projections which ultimately led to the overall business plan to be scrapped. 3) We did not open the new service.
569	1) Planned to expand our service offerings into the automotive industry. As the market began to show signs of slowing, we found the automotive industry decision makers were reluctant to move forward. We began to focus on other industries (medical, law) that were more recession-resistant. 2) We have been successful in growing our medical and law services levels as a result of being in touch with a changing economy. 3) So far, so good!
571	1) PRESSURED BY CLIENTS TO TAKE ON WORK OUTSIDE OF MARKETING PLAN 2) TWO INCIDENTS / / 1) DECLINED TO TAKE ON WORK OUTSIDE OF MARKETING PLAN / & REFERRED TO OTHER COMPETITORS / / 2) TOOK ON WORK OUTSIDE OF MARKETING PLAN / THIS LEFT ME OPERATING OUTSIDE MY EXPERTISE & WITH TOO MUCH BACKLOG OF WORK / / 3) 1) DECLINING WORK OUTSIDE OF MARKETING PLAN BROUGHT BOTH PEACE OF MIND AND MORE PROFITABILITY / / 2) TAKING ON WORK OUTSIDE OF MARKETING PLAN DROVE ME NUTS AND RESULTED IN POOR RETURN ON MY TIME INVESTED

574	1) Pricing by competitors resulted in adjusting prices to be competitive. Service offering driven by menu pricing which simplified offering to customers. 2) The simplified pricing resulted in an increase in unit received for service repair. / / Note the initial questions do not allow answers for a business that is involved with products/ services. 3) The simplified pricing resulted in an increase in unit received for service repair. The response from the customers was positive they liked the fact that they could quote a customer before contacting my company. The result was a faster service for our customer and their customers and an increase in our business.
575	1) Pricing strategy did not work as weak US dollar allowed US competitors to enter the market and compete on price. 2) Competitor made a specific push on our major accounts with lower prices. 3) We matched the new lower price. Kept customer and sales volume but at a lower margin.
576	1) Probably universal to any deviation would be lack of execution. Mainly relating to the Lack of buy in to the marketing process since it is new to this company. There is no tie in to their overall business plan. The current sales team didn't support it. Currently we are retooling though and trying it my way - a little bit. There are also cash flow issues (some parts of the business are in high risk), lack of follow through or decision making. 2) See above answer. Our sales were below where we wanted and we spent a lot of time and money developing proposals for prospects who weren't qualified or who had projects that weren't feasible or had no funding. The positive side of this, they now see the wisdom in prequalifying prospects, projects and developing competitive and customer intelligence files (instead of just in their heads). Overall, the "shotgun" approach and inability to say no to a project was not successful from a revenue standpoint. Additionally, the amount of time and energy the engineers had to spend quoting machines and projects that never came to fruition wore on their enthusiasm and support of the sales department.
577	1) Product positioning change secondary to competition failure 2) Competition failed @ a head to head competitive study which they initiated. 3) Basically we positioned ourselves based upon the market study they funded
579	1) Re-allocation of budget from one media to another form of media - TV to print 2) was not an "incident" - conscious decision based on tracking and measurement 3) Not sure but we increased inquiries/leads as a result of the move
580	1) Really, only deviations from marketing plan have been delays in implementation timeline - primarily due to funding issues and the overall state of the economy. 2) I'm afraid there was nothing really memorable 3) Too early to tell - but I do believe if I had moved forward with planned advertisements they would have hit at the peak of a market panic, and they wouldn't have had any effect. We'll see what effect there might be in the coming months.
581	1)_Request for expansion of our offerings. Changes in healthcare industry. 2) Article in NY Times illustrated a 'killer app' for our system. Engaging a health system partner allowed our moving forward. 3) After constructing a marketing/business plan and model, next step is presenting to Big Pharma.
582	1) Research & Development has run into several roadblocks 2) The design of the connectivity is proprietary. There have been issues finding the people with specific skill sets without jeopardizing the confidentiality issues 3) It's ongoing

584	1) Results did not match projections. Identification of the target market as well as strategies to reach the market were altered. Three months of work ended with no closed business. We re-evaluated the consumer perceptions, did targeted research and decided that the target market identified was not as robust as first thought. It was memorable because theoretically this should have been a great target group. Never really sure why it wasn't. We may revisit this at a later time. Sometimes marketing should work but doesn't. 3) Please see above
586	1) Revised some of the services based on feedback from the target market. 2) We realized that our initial marketing program, while well directed, was not using the terminology familiar to our target market. Plus, we needed to revise our benefits matrix and make it more clear. We needed to simplify our marketing language. 3) We are in the process of implementing the changes at present. Our initial interactions with the target market indicate we are on track.
588	1) Sales not as expected, over estimation of market maturity/readiness 2) Reduction in price and free introductions improved uptake, creating more market awareness 3) Successful, volume was higher than originally forecast although because of lower sales value, financially service fell short of original expectation, however because of increased market awareness price increases have successfully been implemented bringing service sales back into plan
589	1) Salesperson came in for a new yellow pages came in a new add. 2) Convinced us to stay with YP one more year. 3) Don't know yet.
590	1) Service deployment time 2) R&D was delayed 3) took longer to market service
592	1) Setting up a web pages through a designer who was not fully sure of the patent pending concept. After the initial plan started, the sales never increased. We had to rely on the conventional way...which worked better after the change from one designer to the next. 2) The loss of money and connections made with the consumer because the first designer was lax and confused as to the proper text and information to be offered to the viewer of the site. 3) Unsuccessful. Too much money spent.
595	1) Slipping deadlines 2) Vendor did not deliver on time 3) Sales target delayed
597	1) Some clients were not yet at the stage of being ready to work with a training service we were providing. There was quite a lot of preliminary groundwork to be done before people were ready for that level of work. In particular, there were staff members who were way 'behind the eight ball'. When we tried to implement the plan, there was some resistance from these people because they were fearful of change. 2) Some people made meetings difficult to run by constantly interjecting and preventing the enthusiastic, learning participants from moving ahead. They were constantly bringing down the energy of the training process. Some of these people were also taking part in subterfuge - like creating gossip suggesting that there were hidden agendas for a training programme which was designed to help staff be better professional communicators All of the really enthusiastic participants could see why this problem was occurring but it was difficult to do anything about it. 3) We took the original plan and revised it so that it didn't include all participants. We took the emphasis off the outcome and put it on the people. We offered the new 'package' in a different format - as Peer Coaching. We 'invited' participants who were enthusiastic and asked them to monitor their progress closely and contribute an article about how well they did. This stage is in its early days at the moment but it looks positive.

600	1) Started out utilizing newspaper ads and got poor results. Changed to full color insert and face to face marketing. 2) Face to face marketing produced excellent results. Full color insert produced some return. 3) Local Store Marketing should consist of face to face target marketing.
602	1) Tactical marketing strategies did not generate desired results, so we adjusted and moved on 2) Undertook a massive fax blast in several cities - simultaneously with little results. We then developed a massive e-mail campaign which gave the desired results 3) Result was we generated more leads and sales than expected
606	1) The budget was not sufficient. Costs went up. Hence, we made a few media changes. 2) as the costs escalated, and new information came in, we had to revisit the media mix strategy 3) not sure
607	1) The budgeting part. A part of our budget plan was derived from the previous cost of the services. Because of the wrong budget planning the quality of our services almost suffered. We have to add more to the cost so the quality would not suffer. 2) Charging the clients less than the supposed service cost. We almost did not earn because most of the time if you tell the client the cost. That's it. You cannot change it or the clients would not like it at all. 3) We became very honest with the client and the client went to other agencies she ended up coming back with us because of our honesty and being polite.
611	1) The client changed the telemarketing incoming/outgoing plan which / effected sales - 2) It was very hard to implement the program because of the media running during the holiday of Thanksgiving week - and the telemarketing company were not prepared to take the orders. 3) We are still not complete as far as the marketing/media plan are as far as implementing our program.
612	1) The competitor change price and marketing strategy which force us to answer in a appropriate way 2) We change our strategy in implementing Marketing plan due to market trends. 3) After changing our strategy in implementing our Marketing plan we rich defined target.
613	1) The company changed (reduced for 20%) the amount of the budget dedicated to marketing 2) I proposed to cut the least important activities (one event and one conference press), but I increased the investment on the web 3) We were able to recover the situation. / The good result was that we increased the culture on Internet as medium
615	1) the competitors had acquired new capacity and were dumping their service in the market 2) we changed our value proposition 3) partially successful as the competitors left the market

616	<p>1) The deviation was from a specific element in the marketing plan but within the general description of that particular portion of the plan. The deviation was the use of an alternative radio station, however, the alternative radio station communicated with the intended target market. 2) In this particular incident I was attempting to reach the hispanic market through radio advertising. I was made aware of the alternative radio station during my conversation with a radio account representative which focused on a totally different listener demographic. The account rep pointed out the alternative hispanic radio station eventhough the alternative hispanic radio station was with another company and had the potential to reduce the budget for her radio station. This is memorable because she was more concerned about the success of my company what with making a few more dollars for her radio station. 3) I am not sure of the success of this change. It has yet to be completed and needs more time to draw an adequate analysis.</p>
617	<p>1) The economy with disposable income has taken a major effect on people's daily lives and how it effects their decisions. The need to adjust marketing plans, alter course for a small business is easier and absolutely essential in business today 2) My business is involved with the launch of licensee (future franchised) mobile auto repair. As I indicated above, the changes experienced by people's disposable income currently has led to a huge gap between initiating the decision to have proactive/preventative service work completed on their vehicles before the fact. My business is increasing due to the increase of emergency repairs brought upon by the lack of preventative service work planned or executed before the fact. 3) I have changed my marketing focus to increase awareness of "emergency repair" and breakdown services at the homes and/or offices of perspective clients. The previous marketing just touched on the "time savings" element of mobile auto service. The poor judgement of consumers putting off required auto repairs proactively, has led to an increase and re-branding awareness for my businesses' growth.</p>
618	<p>1) The field sales process was assigned the responsibility for executing the "neighborhood marketing program" and the "commercial market development program" for a services based client. / / The field sales team did not possess the experience or skills to execute either of these programs. 2) The field sales team developed an array of alibis for not executing the programs and the owner of the business did not want to force the issue. As a result, we moved the "neighborhood marketing program" to planned status and changed accountability for the commercial market development program to the field marketing process. 3) The field marketing process has generated a number of commercial account leads for the sales team, but the level of production is less than half of our desired results.</p>
619	<p>1) The form of media advertising we used was not effective enough so we changed it. 2) Well the advertising prompts potential buyers to call for an information brochure. No calls were received from this particular campaign so the campaign for this particular area had to change. 3) It was not successful initially which is why it was changed and the changed campaign was probably about a 50% improvement over the initial. So was it successful probably not too much</p>
620	<p>1) the implementation was not working and we had to readjust the market strategy and we changed the focus of the market plan to accommodate the product and the chairman of the companies wishes 2) constant changing of the strategy put a damper on the plan to action 3) the plan had to be rewritten to accommodate the constant changes this had a serious effect on the plan /</p>
624	<p>1) The market changed dramatically and made the plan obsolete. 2) Price of the product we sell dropped severely and affected all our projections. 3) The incident was unsuccessful.</p>

625	1) The market requirements changed such that the product mix was no longer valid. We were able to anticipate this based on real market experience and have integrated strategies that allowed adjustment of the product mix before we were reacting. This is critical as we are regulated by FDA and it takes a minimum of 90 days to acquire new marketing clearances; without you can not sell the product. 2) I can't detail these situations, as the details would divulge Intellectual Property (IP) gained from actual market experience that can not be obtained via any written documentation from external sources etc. 3) It is being very successful. The validation being,,,key market leaders (Customers) are contacting us trying to get involved. Customers are cancelling orders with more established competitors and purchasing our device.
626	1) The marketing effort was not generating the required amount of leads so we changed the positioning and implemented a better plan for the market. 2) Not enough leads, which cost us time and money, we changed and it improved the effectiveness. 3) Not enough leads, which cost us time and money, we changed and it improved the effectiveness.
632	1) The original plan called for seminars on investment management. No such seminars have taken place due largely to time and lack of need. 2) No one single incident, but rather a decision not to implement a major tactical strategy in the original plan - seminars. Relied instead on referrals which surpassed all expectations. 3) Very successful with great cost/benefit ratio.
634	1) The plan depends on hiring & training independent manufacturers' reps in various regional markets. None could be found for Chicago so I am acting as a rep in the area. 2) There was nothing memorable about the situation; it happens frequently 3) I am beginning to generate sales and using that experience to reach reps outside the Chicago area how to generate sales
635	1) the plan has to adjust to changes in international economic changes; exchange rates, interest rates, etc. 2) In last 24 months, dollar value has been steadily declining to the point it did not make sense to pursue the business model we had 3) we moved all purchasing operations from China
636	1) the plan intended to cut competition threat by at least 50% but we only attained approx 25% we changed plan to a more aggressive approach. We utilised a larger media mix. Before Newspapers were not in the budget (only outdoor, radio and mall branding) we added them later and went into heavy sponsorships of events via providing prizes. 2) the aggressiveness in the radio and the newspapers (even though we had to use our 10% emergency budget) paid up. Our name became as a destination for entertainment products 3) Footfall increased by 40% and average basket went up by 12%. Since we had one show being broadcasted live from the store.
637	1) The plan was based on a funding level that was later reduced. Some elements of the plan had to be dropped and some were reformulated. 2) The customer changed the focus of their overall strategy. The product which was the focus of the plan became secondary and the funding was reduced 3) The goals of the original plan were not achieved. The customer wanted to meet the sales goals of the original plan without implementing all of it. There was a heavy emphasis on promotion in the original but none of it was funded in the end. As a result there was little effect on the sales of the product even with the revised plan.

639	1) The plan was to compete with established artists in national venues. We redirected our efforts regionally when it became clear that there was more opportunity at that level. 2) Repeated attempts to generate recognition failed in a highly competitive field. This was quite daunting, since the artwork is very high quality. We realized that additional steps were needed to build up to that level of acceptance. The decisions was made to redouble efforts to gain acceptance in local/regional art galleries. 3) We are gaining traction in local markets, although slower than we would like. So there has been success, but limited. This is OK, since we are still in the ramp-up stage of the business for the next two years.
640	1) The Plan was to have 1 core product line and several 'soft' line, after all contracts were signed we couldn't place 1 core product line in a start-up operation, but rather a wider spectrum of principal line. 2) Chaos!! / Difficulties from the customer's point to assess what we wanted to achieve and what was our objectives. 3) Yes, launching was a great success thanks to our sales capabilities to adpt, but the marketing aspect has taken a 'back seat', so to speak. In the medical industry we rely heavily on marketing strategy to launch but never take in consideration that we might need a 'Plan B'...!
641	1) The plan was to use newspaper advertising as a method of indroduction of the product Women's Glamour Photography, but the editorial staff deemed the content not appropriate for their publication 2) The representative on the phone equated the morality of the product with the offerings of a strip club. 3) The money allocated to that portion of the campain was reallocated into other advertising methods.
642	1) The plan's focus was changed abruptly by upper management. 2) Deadlines the were earlier than expected, or last minute changes to ad designs that changed the ad message cpletely. 3) Ultimately, it was successful. Just the completion was stressful.
643	1) The prime reason for changing was our relationship with a large chemical comapany who wanted us to operate in a different market to the one we had originally envisaged. As they were expending a significant amount of funds in the Project we obviously accommodated their objectives. 2) Nothing in particular, just that we were required to change our emphasis on the market. 3) The involvement of he larger company assisted us in reaching markets we would not otherwise be exposed too. Therefore giving us more exposure to the printing industry.
644	1) The product availability to our client was delayed due to one of our major supplier who had his factory destroyed by a major fire that affect the whole industry. This brought some difficulties in obtaining equivalent product on the market. We had to change all the publicity, demonstration, appointment, special even that affected revenues as well. 2) The whole company was mobilized. The difficult part was to establish the new relase date. Since all event were very well planned, it was easy to reschedule. We just add some promotional activities during this extended delay. 3) The new approche is under way and we can say it was more a favorable opportunity than a conterproductive even. Formal intent of purchase increased above forecast and this extra activity would enable to increase our forecasted sales for the year.

645	1) The reason for the deviation was the new competitor who entered the market with stronger financial muscle. We therefore had to reconsider our planning. 2) Because marketing planning involves the budget and time allocation, these issues had to be revisited to prepare for the shift in the planning. 3) The outcome was positive as we were able to counter the new entant's strategy and were able to obtain a significant share of the market.
648	1) The sudden apperance of Hypermrkets in our country, with many branches opening in different cities in a short span of time, required quite a different approach to distribution of products and service. / The tradional trade at first did not react fast enough to compensate / the end-consumer behavior. Thus many opportunities were lost. / This scenario required a deviation from the original marketing plan by / trying to secure call-orders in bulk from the Hypermarket Departments / directly and register as authorized vendors. At the same time to initiate a turn around at the traditional retail outlets by providing / special Value Packs and Bonus Packs and concede returns, if after 3 months theSeasonal Sales had not cleared. 2) Competitive edges developed between Hypermarkets and Supermarket Chains. / Our traditional clientele were open for marketing campaigns with"silent / salesmen" which were put for display in strategic well chosen areas. / On the other side the Hypermarkets and Supermarkets operated with Gondolas and Bins for short periods to conquer volume sales first hand in short periods. 3) Overall our tactic to take the different market segments in confidence to gain their cooperation in their specific capacity and interestpaid off well, because we had not hesitated to get the products "tailormade" to each group.
649	1) The tactics were not as effective as anticipated. Response was lower, and modifying the message did not trigger significant changes, so we reinvested funds in another area that was working better than we had expected. 2) Hmmm. Not sure I can answer this question. We set expectations for return for each of our marketing plans. We try to be somewhat detailed about why we have set certain expectations. Then we measure results against expectations and try to learn why results were different. If we have adequate resources we'll test our theories about why results were different and try to improve results. If we're too busy or don't want to take the financial risk, often we'll just shift funds to something that's working better for us. 3) In this case the shift was successful because we got a higher return for our investment. We also decided to stop trying to pursue the tactic because we've had three attempts that just didn't offer enough return regardless of our approach. For our business and markets, other methods appear to be more effective. At least at this time.
650	1) The union entered one of the States we offer our services in of which we controlled about 70% of the market. The union using political arm twisting lifted the state requirement for our services and began to spread word that the service we offer was not needed to members and others in the industry. Contracts began to cncle requiring us to take immediate action and crwate a counter campaign emphasizing the need and benefit of our services and negating the misinformation provided by the union. This counter campaignh resulted in less than 20% loss of business of which of that 20% some are beginning to come back to us. We considered this successful as the end result could have been far worse. 2) See above.3) See above
656	1) timeline changed due to equipment delivery causing move back of opening date 2) food service equipment delayed...opened the property in two stages 3) initail programs had to be adjusted...but adapted to situation.After several similar situations in openings, initiated an established soft openings and other alternatives

658	1) Unanticipated shortfall in funding created a need to revisit plan. 2) We needed to reevaluate the product offering, and eventually determined that we would not pursue that offering due to lack of funding 3) See above
660	1) Unexpected event offering in which promotion was needed 2) not all that memorable, had padded the plan budget to take in account unexpected needs. So financially there was not an impact, it was more of a rush to plan out the marketing pieces. 3) Yes, successful again which I attribute to budgeting for an unexpected need.
661	1) Unresponsive targeted mfgs. required a different plan of contact to attract mfg. against prototype. 2) Just a lack of response to web mail and e-mail efforts. We resorted to wave-mail, and follow-up telephoning. 3) Successful presentation to a mfg. company who is now interested in taking the design and prototype to the mfg. stage.
666	1) We altered approach to new clients from a seminar style to one on one meetings 2) We found that that prospect was more open in one on one settings than a group. We were able to get more information that allowed us to customize our service delivery. 3) Closing rate went from 20% to 70%
667	1) We are a non profit organization that receives funding from our state and at the federal level, plus we obtain grants. Often, the state and federal funding can be adjusted or augmented mid-year which requires us to deviate from our original plan, budget wise. When we obtain a specific grant, we must develop a plan for marketing implementation based on the goals of the grant. 2) We decided to develop a web site product to market to other similar non profits, this required a whole new, for -profit change of direction. We began looking at receiving fees for specific services such as this versus our normal, required service delivery at not cost. 3) It has been successful so far, yet is still in its infancy and ongoing.
668	1) We are a technology services provider and seek to take advantage of technological trends that optimize and support our company' overall business strategy 2) New technological advances were launched within the market place and we rode the wave so to speak of the product and solution launches initiated by comapnys like Micorosoft, HP and CISCO 3) The changes were a success since they were able to tie in with the message being put out in the marketplace by the bigger comapnies that have prominence in the marketplace
669	1) WE ARE IN THE AIRLINE GENERAL SALES AGENCY BUSINESS, THE PARTICULAR AIRLINE THAT WE HANDLE IN SRI LANKA WAS PULLED OUT OF THE COUNTRY DUE TO SOME REASONS. IN THIS SITUATION, I AS COMPELED TO DECIATEFROM THE ORIGINAL PRICING LEVELS AS WELL AS THE POSITIONING. 2) IN SPIT OF THE HIKE IN PRICEING LEVELS, CUSTOMER BASE WAS IN TACT DUE TO THE RELATIONSHIP AND THE CREDIBILITY. 3) IT WAS VERY MUCH SUCCESFUL.
670	1) we changed advertising because of lack of response 2) we mailed postcards and did not get the response we expected. 3) We stopped mailing postcards
671	1) We changed from direct sales to a sales agent strategy. 2) We had an opportunity to bring on an agent that had a close relationship with our prospects. 3) We are not sure of the success yet, although it has certainly slowed our schedule to a crawl.

673	<p>1) We designed a new offering for our Christmas Event. The Marketing plan called for a focused message on the quality artists we had at our festival. Which is the brand of the festival craft show. The CFO stepped in and desperately wanted to change the focus to be more sales driven vice the quality of our offerings. / / Since this deviate from our plan and the brand essence of the event as the marketing director I was against it. The President of the company decided to go with the CFOs concerns and forced a change in the marketing. 2) As this occurred as marketing director I pulled out the marketing plan pointed out how if we deviated from this the outcome would be loss of reputation, thereby loss of sales and our core group of community supporters would be angry. My words fell on deaf ears. 3) The event was a 40-day event. On day 8 it was apparent by the headlines in the newspaper that our core group of community supporters were indeed angry at us. Our sales dropped significantly over the next week. / / The president came to me and actually apologized and asked if I could somehow turn it around and go back to the core brand essence. It was a difficult task but by the third week we started to turn sales around. In the end we did a little bit better than break even but had we not had to deal with the issue early on we would have turned a much bigger profit. / / Both my boss (president) and our board of trustees have now gained faith in my ability to handle a marketing plan and I believe now have more confidence in my planning.</p>
675	<p>1) We discovered we had some internal personnel issues with distribution so had to change how we went to market to avoid conflicts. 2) When implementing the plan our feedback from our distributors was not positive so we followed up with personal visits to discover we had some personality conflicts. We changed the plan to avoid the conflicts and were very successful. Before any plan can be successful you must listen to the Voice of the Customer. 3) Yes it was successful with changes in strategy.</p>
676	<p>1) We encountered some resistance from the marketplace in connection with the proposed warranty allowance program and readjusted the program to provide additional options to the customers. 2) In face to face meetings with existing customers, they reacted negatively while we were promoting a new product line. The product line was new to their segment of the business and would allow customers to purchase the product and the ancillary items needed for installation, which were often sales lost to the traditional sources of the new product. 3) The actions we took as a result of the incident were successful. With some changes in the marketing and product handling, we grew the sales of the new products 3-fold in 3 years.</p>
677	<p>1) We expected to use a distribution channel for a product line that the market considers a commodity. The market is saturated with suppliers (at least 8). Even though our product is of a much higher quality (read that as higher cost to us and higher price to the market), we could not generate enough interest at the distributor level to move an appreciable amount of product. 2) I have worked in this industry for over 25 years and have many contacts that I consider personal friends. After going to 6 or 7 of these people, it became almost comical trying to get any interest at all. One of them actually brought out a stack of catalogues of competing products about 2 feet tall. 3) We have moved to a direct sales approach and pulling the business from specialty sales through distribution rather than the push model with commodities. Once we establish a big enough base with the specials, we should be able to gain some ground with the commodities.</p>
678	<p>1) We felt that sales were not proceeding at the pace we wanted to we did a special target mailing with a deadline and special incentive. 2) It worked and sales picked up. 3) Successful, we sold out early.</p>

682	1) We had a chance to work a street fair 2) We meet a lot of people and pickup some new clients 3) So successful that we are doing it again in April 2008
684	1) We had envisaged that the main method of communication would be by email - we found after a short period of time that faxes were much more effective. 2) EMail were not getting through to the right person, but faxes were hitting the right desk and getting a very good response - somehow people think that faxes can't be personalised so assumed it was not a bulk send. 3) The campaign was a great success.
685	1) We had not considered a marketing segment that was presented as an unbudgeted opportunity. 2) We had planned to limit our resources to an existing customer and ended up servicing another customer in the same commodity because they were dissatisfied with their existing vendor. In addition, we "forced" to handle another commodity because of our strong dependence on a major customer. . 3) We were able to accommodate all of the customer's needs with good utilization of equipment.
686	1) We had the chance to advertise alongside one of our clients who was keen to promote us alongside their own services/products. We develop websites and they were promoting their products to potential resellers at a trade fair. 2) We managed to gather up a lot of feedback about our services and what potential clients required. normally we only get to speak to people who contact us through our website or on the telephone. 3) We managed to generate a small amount of business from the fair but the feedback was very welcome and helped us out a great deal.
687	1) We had to change the look and feel of a brochure which were designed by a graphic designer in the beginning stages of the marketing plan. After receiving the first brochures from the printer, we start handing it out to potential prospects with a clear reply that it was not communicating correctly the service offering and the theme of the brochures created more confusion than anything else. We had to do a serious back flip, fired the graphic designer and appointed a new crowd to design a more appropriate brochure. 2) The service/ product was a new process improvement methodology which are in competition to 6 Sigma and Lean Manufacturing. It is a difficult product to market with a huge emphasis on consumer education. The first designer suggested that we based our market communication on using a musical metaphor. This was a great idea, but we failed to really test it before implementing it. A little high on all the hype and energy at the initial presentation. This has been a very memorable experience for me in that it took me back to the basics: Test, Test, Test - before implementation. Therefore, I will allow a section in my next Marketing plan for pilot implementation or test marketing. 3) We managed to switch themes in having a theme called "The Face of Change". This was more in line with the product benefits and are speaking directly to the target market. However, this was a costly mistake in the beginning - it turned out to be the best thing we could have done.
688	1) We had to do away with print advertising and spent the budget on exhibitions instead. 2) Frantic calls from the quarterly print publication with whom we advertised in the previous years. 3) No increase in advertising cost. / There was increased awareness in the extended market targeted by the exhibition. / There was immediate feedback on the coverage and possible effect of the decision.
689	1) We had to go over budget on marketing collateral due to demand for new materials from different business units within our firm. 2) Some of our business units requested specific marketing materials for their areas. We had to develop new brochures and other pieces to complete our marketing package. 3) We now have a complete set of materials that speak to the various service areas of

	the firm.
690	1) We included a telemarketing strategy in our marketing plan. We implemented a three tiered marketing approach that included our telemarketers calling prospects shortly after they received a direct mail piece from us. Their objective was twofold; 1. Attempt to set an appointment for our sales team and 2. To gather data regarding the prospects current employee benefit plan. We focused on Health Reimbursement Arrangements (HRA's) as an alternative funding vehicle. The approach fell flat on its' face, and we were forced to retool a new approach that was easier to explain and understand. 2) It was memorable because it put a lot of pressure on our management team to quickly redeploy a new plan that would succeed. Our sales team relies heavily on the projects success to achieve their sales goals each year. I will admit that there was a "gulp" factor as we launched the new campaign for fear that it too might fall short or not succeed. We were already behind our first milestone expectation on the number of Introductory Appointments that would be set. 3) The new approach was successful. We focused on a new product that we had exclusivity on. We had already planned on launching this campaign, but it simply moved up our timeline.
695	1) We offer a series of business classes and face-to-face counseling to small business. We found that many of our clients for counseling had no concept of what was involved in starting a new business. Our classes normally cost \$35.00, and we decided to offer our Pre-business Orietation class free, to avoid much repetitive work at our counseling sessions. 2) There really was not an incident as such - just a realization that we could be more efficient by doing this. 3) This was a very successful decision, and is now part of our overall product offering.
697	1) wE PLANNED FOR ONLINE CAMPAIGN BUT THE SALES TEAM WAS NOT COMFORTBLE WITH IT HENCE WE HAD T ADOPT AD IN LOCAL YELLOW PAGES DIRECTORY 2) WE DID GET IRRELEVANT RESPONSES FROM THE YELLOW PAGE PRINT DIRECTORY 3) WE WENT BACK TO ONLINE AD STRATEGY. BUT WE LOST AROUND 6 MONTHS OF TIME
698	1) We planned on advertizing in regional publications that catered to specific trade show attendees in the apparel market. Due to the lackluster,economy, soft retail in 2007 and the publications decision to increase prices for ads and change distribution policies to home subscriptions only, we chose to shift resources to dirct marketing efforts instead. 2) Trade show attendance was very low for the first two quarters of 2007. We noticed the shift in second half of 2006 from companies attending the trades shows and spending 'open to buy' and companies not attending and spending capital with road sales reps instead. 3) We shifted our marketing to direct mail and shifted our showroom only sales representation to new reps in the field. This shift required the direct marketing to introduce and support the reps. Our sales had tripled in 2006 from 2005 and started to stall as a result of the trade show attendance declines across the country. The shift helped us to recover from what would have been a 50% decline in sales for 2007 to only a 25% decline. Others in our industry who were not as flexible have lost more than 50% in sales as a result of this shift. and some are out of business at this time because they were not able to react in time to the shift.

699	1) We planned to spend x dollars and x time on postal marketing and x time on email campaigns...well after the first 3 months of 2 solid campaigns running together, we were ONLY getting responses from the email campaign, which cost less in all aspects, so we pulled the postal campaign (although postal takes longer for results, it wasn't worth the expense for the wait). 2) We focused a lot of time and manpower into creating the "perfect" email campaign and it worked! It increased the RIGHT kind of business that we were targeting. 3) It was successful; however, it was far from what our plan of action originally was.
700	1) We shifted market focus to a different customer group that we had previously not planned for. 2) We shifted marketing budget and created new messaging as a response to the strategic shift. 3) Yes, the new target group exceeded expectations and the investment ROI was within corp targets.
701	1) We started by focusing on one product to attract a specific customer. Then decided to open the plan to include all our products. Because our products are custom built to the specific needs of our customers, we needed to modify our plan as our customer's needs changed. 2) Basically since our customer's needs changed from their original design we had to adapt and change our product design. 3) Yes, we were successful because we were able to modify our product to fit our customer's new requirements.
702	1) We stated that we would target the franchise industry within 90 days of the marketing plan being written. This did not happen, and has not happened to date (plan was written 6 months ago) 2) Our marketing team (and more specifically me) took on additional initiatives that came up that took priority. Also, we have had web team challenges that have delayed other projects (due to their bandwidth. Some of my marketing initiatives are dependant on processes that need to be completed by our web team. 3) It has been unsuccessful to date, as time as not been made to target this business category. The plan has not been updated to reflect this and other deviations from the marketing plan, but it needs to be.
703	1) WE tried a new website marketing company and the results were not what was expected so we had to change which direction our company was moving to spending our advertising dollars a different direction. 2) The reason why it is memorable is because I had to spend a lot more money than was anticipated. 3) Not successful because of the budget that was messed up.
704	1) We went through a rebranding process so we had developed a marketing plan that included developing and implementing a brand building campaign (an integrated plan involving targeted media activity, advertising etc.)It simply didn't happen. 2) The Marketing Director at that time (my manager) had no understanding of communications and was very risk averse. She was overwhelmed by what needed to happen at her level to support the implementation of the plan and took the easier route of persuading the CEO to withdraw his support (even though it had been approved and budgeted for). 3) No change in our brand profile. No external promotion of our new visual identity. Now we have a new Marketing Director but he needs time before he's willing to approve a major campaign. So we're back where we started!

705	1) WE were marketing a segment of our business to outside investors. We were told that our business plan needed to be much larger so that the advisors to the investors, lawyers and accountants, would find enough billable hours to scrutinizing our information. It took us additional months to enhance our data and the delay and cost was the deviation to the marketing plan. 2) Our original business plan material was one 3-ring binder four inches thick. / Our finished "data room" was 50 four inch binders four inches thick. We located the data rooms in Washington DC., Boston Mass. and at our home office in Canada for the convenience of potential investors. 3) It was successful in raising international interest in our company and its proprietary technology and intellectual capital. We have taken the company off the market (pending the development of new technology) until spring 2008. Suitor are already lining up so we anticipate a sale this summer.
706	1) We were not getting the right response to justified the cost. Once we revamped the target market, we were able to see positive results. 2) We were able to get more press coverage, and sell out the tickets. It was a performance group new to the college scene. 3) We sold out and had to add another night performance.
710	1) When new information was gained on the effectiveness of unforeseen channels, we changed our marketing strategy drastically to accommodate. Over time, the new channel became less fruitful than originally anticipated, and we were back to reworking a new plan. 2) Analytics demonstrated the impact of the new channel. This sparked a broad slew of investigations into similar channels instead of executing in those defined by the marketing plan. 3) The incident was successful in the short term. Long term, it was okay.
713	1) when there was no buisness in my target area, ended up going into very area/region. 2) got the business all right but it was very costly. 3) It was a loss.
714	1) When we had a new competitor enter our market 2) we enhanced consumer services and relationship marketing activities 3) we expanded our revenue with a 4.6% increase in profits.
716	1) Whenever there is a shift in the market or a new competitor arises it's necessary to adapt your plan. 2) In one instance, the product was an optional health care product that would improve consumer care for a specific group of the population at a modest cost. The insurance providers didn't reimburse at the rate expected, so it became clear that we had to adjust our positioning and target the technology to a broader market. 3) The outcome is unclear at this point. Enough time hasn't elapsed.
717	1) With gas prices constantly rising the transient room nights forecasted began to fluctuate dramatically and we had to search our market statistics and revise our room night forecast up and our ADR. 2) Things (market began to level off)and we moved more of our ADR goal onto the king rooms and away from the double rooms 3) We were still able to exceed our forecasted ADR by mixing the room types to the demand in the market.

718

1) With higher education, economic downturns can have the opposite effect on enrollment. In order to make the most of the opportunity, we expanded scope of our target audiences, and focused on the underemployed. In order to attract these individuals, additional micro-campaigns were developed to target marketable skills and to entice those looking to get back to finish their degree. 2) It's hard to say whether the success was a result of the marketing campaign, or simply attributable to normal, long-standing trends. The vehicles we used to target this audience (newspaper ads) is typically where a good deal of traffic among adult learners originates from, so we had a difficult time differentiating. We also used a specific telephone number for response, but that it's effectiveness was inconclusive, for the most part. 3) Adult learner enrollment did go up, but in admissions screenings, there was a lack of conclusive information related to what vehicle was the source of this success.

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