Marketing is concerned with practical and profitable action. The “-ing” in marketing reminds us of the active character of the discipline. Marketers actively plan, audit, test, launch, track, appraise, assess, etc. When those who are engaged in the craft of marketing clamour for practical and relevant guidance they are looking for improved tools, techniques, hints and tips for planning, auditing, testing, launching, etc. The focus is on how to do something better than before, and to do so in a way that provides a competitive edge. The desire is for diagnostic skills and prescriptive advice.

Manuals and handbooks directly address these needs. Done well, these simply and clearly inform the manager of what to think about, what questions to ask, what information to gather, and what to do. Two such books are considered here:


Marketing Plans

McDonald explains what marketing plans are, how to prepare them and how to use them. A strong focus on process runs throughout the book. There are four parts:

- Chapters 1-3 introduce the processes of marketing and marketing planning.
- Chapters 4-6 and 11 examine the strategic marketing plan, in terms of the marketing audit of customers, markets and products; setting marketing objectives and strategies; and using marketing information and forecasts.
- Chapters 7-10 consider the preparation of tactical, one-year operational plans, with a focus on promotion, pricing, distribution and customer service.
- Chapters 12-13 grapple with implementation – first in quite a general way, then through a step-by-step approach to the preparation of marketing plans.

Readers are expected to differ in their requirements. Some will go straight to the step-by-step guide for preparing a plan – this is by far the most applied section of the book. Those with primary responsibility for strategic marketing planning will skip the tactical material in chapters 7-10. By contrast, those charged with producing a comprehensive plan will need to work through all sections.

Considerable thought has been given to learning features: chapter summaries, key concepts, crucial terms in the margins, examples, marketing insights, headlines, case studies, application questions, chapter reviews and exercises. Skill-based computer software, videos, self-assessment questionnaires and computer-based training packages are also available. This one-stop package of resources is not only intended for study – it is to be used. Marketing planners, students, and instructors will welcome the impressive amount of thought and care that has gone into preparing the package.

Marketing Audits

Wilson concentrates on the auditing component of the marketing planning process. In subject matter this book is closely allied to McDonald’s manual. However, the approach is different. Wilson gives us a book of lists. These are mainly lists of questions. A total of 28 lists cover a wide range of themes: marketing strategy and planning, product/service range, the service element in marketing, company performance, export marketing, marketing information, market size and structure, future markets, the salesforce and its management, customer care and support staff’s role in marketing, cross-selling and internal marketing, the agency system, non-personal promotion, the distributive system, the buying process, analyzing lost business, introducing new products/serv-
ices, user industries, key customer marketing, competitive intelligence, physical distribution and packaging, industry contacts, pricing, images and perceptions, quality in marketing, non-differentiated products and commodities, service businesses, and product/service financial information.

The comprehensiveness of these lists is apparent, although Wilson readily acknowledges that: “The lists are not complete – they never will be”. Astutely, he notes that deletion of lists and individual items on lists is as important as accretion if the auditing process is to remain manageable. Manageability is a key consideration because these lists are designed for use. The reader is offered a down-to-earth approach that can be explained easily to a novice marketer and serve as a reminder for the more experienced manager. The auditing process starts with the collection of existing documents, irrelevant lists/questions are deleted, initial answers are given for relevant lists/questions, individual/group interviews are conducted, courses of action are recorded, action points are categorized according to urgency, likely cost, ease of implementation, etc., schedules and monitoring processes are agreed.

To facilitate use, helpful learning features are included. Apart from the lists themselves, there are introductory statements, flow-charts, templates and pro forma charts, and a CD-ROM (which can be edited by a manager who is engaged in the process of administering a live audit).

Wilson is recognized for his championing of industrial marketing, and there is appropriate coverage of themes such as key account management, salesforce management, and exhibitions, but the lists are intended to be general, relating to professional services and consumer marketing as much as B2B marketing.

The Value of Manuals and Handbooks

Books of this type are hardly new in management. Noteworthy examples exist in areas such as negotiations (Fisher and Ury 1981), team development (Belbin 1996) and marketing management (Ries and Trout 1993). These books belong to a similar genre, being neither research monographs nor undergraduate textbooks. Many of these books have been immensely successful in management circles, although some are more explicitly popularist in tone than others. McDonald is in fact a best-selling author—Marketing Plans is into its fifth edition, the project having started in 1975 and the first edition appeared in 1984. Wilson’s text retains the core of previous editions published under the title Marketing Audit Check Lists, although he points out that the new work makes previous editions obsolete. Several factors account for these levels of success.

First, the authors recognize a fundamentally important point that far too many textbooks overlook. To quote McDonald (p. viii): “The problem … is not that the philosophy of marketing is not believed, rather it is that most companies, particularly industrial goods companies and many service organizations, have difficulty in making it work”. These books are concerned with making things work – they are concerned with helping managers gather information, make decisions, agree actions and implement plans. Consequently, practical guidance comes centre-stage.

Second, they provide short-cuts for busy managers. Wilson (p. 1) makes the point that the value of lists is: “not to have to rethink, reorder or rewrite what has perhaps been done many times before”. Also, in using a manual or list it is far less likely that something important will be overlooked or forgotten.

Third, they tap into a wealth of experience. In some books this all too easily comes across as a succession of “war-stories”, but skillful authors can begin to generalize from their experiences and offer genuine insights. McDonald (p. xii) is at pains to stress the learning that has come from his extensive study of marketing planning. This has shown the importance of having strategic marketing plans with “a clear and simple summary of key market trends, key target segments, the value required by each of them, how we intend to create superior value (to competitors), with a clear prioritization of marketing objectives and strategies, together with the financial consequences”. In practice, many plans are not at all like this: “Frequently, they are diffuse, confusing compilations of unconnected sections”. Within specific chapters he identifies a number of problems. Here are some of his examples:

- “Market overviews contain substantially more information than is necessary, with no hint of the implications for marketing activity.”
- Key segments are rarely identified. ‘Segments’ are often sectors or products, rather than groups of customers with similar needs.
- The competitive situation is not well analyzed and plans appear to assume no activity or reaction by competitors.
- SWOT analyses rarely pin down convincingly the
value that is required by segments. They are frequently too general to lead to any actionable propositions.

- Our own distinctive competences are rarely isolated and built on.
- SWOTs are rarely summarized clearly and logically in a portfolio which provides a categorization of the relevant potential of each and our relative strengths in each.
- Marketing objectives are frequently confused with marketing strategies and do not follow logically from the portfolio summary.
- The resource implications of effecting the marketing plans are not always clear.”

Anyone who has read large numbers of marketing plans will recognize these problems. By following McDonald’s advice there is greater chance of avoiding the worst of these problems.

Wilson (p. 283), drawing on his experiences, is also able to isolate a number of principles:

- “All answers to all questions should be examined critically in relation to the sources of information. ‘How do we know?’ is a vital interrogative. Folklore must be eschewed at all costs.
- The way data are used is more important than acquiring them. The system fails totally and the time investment is wasted if the data gathered are not applied, are used only partially, or are used badly.
- No action will occur as a result of the marketing audit unless every task is clearly allocated, tightly-scheduled and monitored punctiliously.”

These principles have a familiar ring about them, but they are no less important for having been repeated.

Fourth, the “hands-on” approach lends itself to a non-nonsense presentation style, making the books accessible. These manuals are ideally suited to marketing managers – whether they are trying to self-administer the advice or use it as a component of a training program. With all the questions, exercises and support packages, the manuals are ideal for in-class discussion and debate on training programs – especially where students have direct experience of marketing planning and are able to reflect on these experiences.

The Dangers of Manuals and Handbooks

Despite the popularity of books of this type, in academic circles there has been something of a sneering attitude to them. In part, this may reflect envy at the popular success of these authors (although, coming from marketers, this is somewhat ironic). But, in addition, there are a number of very real dangers – some of which the authors are only too willing to acknowledge and give warning to readers.

First, there is the issue of evidence. Standard textbooks are preoccupied with descriptions and explanations, and are often perceived as not very practical. But, with the better ones, at least there is an attempt to ground their work. By contrast, the fear with manuals is that the emphasis on practicality overrides any concern for evidence and thorough grounding. The question needs to be asked: is the readiness to prescribe matched by a readiness to find grounded principles, upon which the prescriptions ought to be based? Ideally, we want textbooks that have something useful to say about application and implementation, and manuals that are grounded.

Second, a criticism of much grounded research is that it merely plays back what managers do, rather than offering prescriptions for the improvement of management practice. Manuals are different. They prescribe. They have normative goals. In this respect, the goals of the books under review are not dissimilar from those of the marketing engineers (for example, Wierenga, van Bruggen and Staelin 1999, Wierenga and van Bruggen 2000). Yet there appears to be no realization that these goals are shared; that marketing engineering has something to offer the manager who is reading manuals such as Marketing Plans or The Marketing Audit Handbook, or that these authors would have anything to contribute to marketing engineering. We have created boxes of knowledge, where perhaps there should be Venn Diagrams.

Third, too prescriptive an approach might result in constrained thinking, an inability to be creative and an unwillingness to think outside of the box. As Wilson (p. 1) states: “It is recognized that checklists can also inhibit original thinking and produce an unconsidered acceptance of what has been revealed”. For this reason, Wilson invites the reader to pose questions and be reflective. His approach is a questioning one. Piercy’s (2001) handbook on Market-Led Strategic Change is presented in a similar way, with a useful blend of prescription and open-ended discourse.

Fourth, a related concern is the tendency to marginalize academic work in the name of a practical no-nonsense
style and approach to the subject. The effect may be unintended, but by not having references and the trappings of academic monographs the message is conveyed that the manager does not really have to worry about the underlying research. Which is likely to mean she does not consider the variable quality of the research, nor does she get into the habit of consulting the literature for new insights – something that has been identified as a major problem in keeping managers abreast of new principles and new techniques (Armstrong and Pagell 2003).

Fifth, there is a need to be explicit about contingencies, conditions, and contexts. McDonald argues that his book is equally relevant for consumer, service and industrial goods companies, because the process is universal. Indeed, any book will tell us that the process of marketing planning consists of a situation review, assumptions, objectives, strategies, programs, measurement and review. He also talks of applications to companies ranging from world leaders in their fields to small domestic firms. But he goes on to stress that within this broadly universal process, there are contextual issues to consider. He presents some of these as a set of questions (p. viii):

- “When should it be done, how often, by whom, and how?
- Is it different in a large and a small company?
- Is it different in a diversified and an undiversified company?
- Is it different in an international and a domestic company?
- What is the role of the chief executive?
- What is the role of the planning department?
- Should marketing planning be top-down or bottom-up?
- What is the relationship between operational (one year) and strategic (longer term) planning?”

These are highly pertinent questions to ponder by anyone engaged in the process of marketing planning and they suggest that when it comes to the details of marketing planning one size will not fit all.

**Conclusion**

What is the verdict? There are dangers with some of the manuals and handbooks on the market, and it is as well to be alert to these dangers. But, for managers in particular, this genre of book has tremendous appeal. There are sound reasons for this. What we need to be able to do is sift the good from the bad, not dismiss the whole genre. There is a need to distinguish the informed and grounded from the opinionated and speculative; the latter may be true, but we have no way of knowing, whereas with the former we should have at least some basis for knowing. Fortunately, it turns out that some manuals and handbooks are very well informed. Back in the 1970s, the popular (if not popularist) Getting to Yes (Fisher and Ury 1981) was underpinned by the Harvard Negotiation Project, a serious research endeavour. It is to be hoped the same can be said of the marketing books under review – *Marketing Plans* and *The Marketing Audit Handbook*. Certainly, it is evident that these manuals and handbooks exude professionalism, are written in a down-to-earth and accessible style, and impart learning from vast stores of business experiences. Recommendation: buy for use.

**References**


Mark Uncles
School of Marketing
UNSW
From newbies to the marketing pros, from small to large businesses, every marketer needs to have a plan to make sure things are running effectively! In this article, get the plan and templates to help you stay organized and effective! Creating an integrated marketing plan is necessary in order to attract and convert buyers in a digital age. If you’re sold on the importance of a solid marketing plan but don’t know how to put one together, this is the article for you! Below we will discuss the essential things you need to include and we might even throw in a snazzy marketing plan template or two just for you! So, let’s not dilly-dally! Let’s get planning!