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Implementing Marketing Strategy

This paper reviews the issue of implementation in marketing strategy development, adopting a perspective emphasizing issues of the decision-making process, and drawing on the broader literatures of strategic management and organizational behaviour for insight into the marketing implementation problem. An initial focus is the damaging dichotomy between strategy formulation and implementation in marketing, leading to an analysis of the sources of implementation problems in marketing, and the development of marketing implementation tactics and strategies. This paper concludes with a management agenda for addressing marketing implementation.

Introduction

This review of the literature suggests that while there have been many theoretical and prescriptive contributions to the debate about marketing strategy implementation, somewhat less has been achieved in the way of systematic conclusions to be placed before managers as the basis for action.

At its simplest, the implementation problem has been described as "the all too frequent failure to create change after seemingly viable plans have been developed" (Nutt 1983). Such views lead to the common theoretical perspective that implementation involves actors, intents and "a procedure directed by a manager to install planned change in an organization" (Nutt 1986). While providing a useful starting point, there are substantial problems with this view of marketing implementation as part of a rational, logical, sequential flow of missions, goals, strategies, and tactics which are then implemented.

In more practical terms, the managerial view of marketing implementation is commonly stated as "making strategy work" (Bonoma 1984; Hamermesh 1986; Raimond and Eden 1990; Giles 1991), by evaluating what is required to achieve strategic marketing goals in a specific organizational environment (Piercy 1985, 1989, 1992; Cespedes 1991). However, this corporate environment is one where individuals and groups may "use gesture, delay, and obstruction to contain or block change attempts they find threatening or merely disagreeable" (Nutt 1986).

This paper will first consider traditional administrative approaches to marketing implementation. Attention will then turn to the dichotomy between marketing strategy formulation and marketing strategy implementation, which the authors believe lies at the heart of many execution difficulties in organizations. This leads to the consideration of tactics and strategies for *overcoming* implementation barriers and the integration of marketing implementation issues into the strategy process in an organization, in efforts to *avoid* (or minimize) the emergence of these barriers. The

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perspective adopted is one based on the analysis of issues of *process* in the seller organization, and also one which draws on the broader literatures of strategic management and organizational behaviour for insights concerning marketing implementation issues.

Traditional Approaches to Implementation

The traditional approach to implementation characteristically treats it as an activity which follows on from strategy formulation, and emphasizes organization design and the manipulation of systems and structures around strategic goals (Bourgeois and Brodwin 1984). In this approach, managers ultimately rely on their authority to adjust the organization's structural framework as a means of enacting strategic decisions (Galbraith and Kazanjian 1986). Conventional approaches to marketing implementation thus focus on the following type of issues: strategy and structure relationships; budgeting and resource allocation systems; executive leadership approaches; and, control systems.

Much work has focussed on the "fit" between organizational structure and strategic choices. This view holds that "strategy drives structure": new strategic directions require the development of new marketing structures and administrative mechanisms. There is, however, danger in underestimating the effect on those strategic choices of the preferences represented by existing organizational frameworks. As Corey and Star (1971) point out:

> "It must be recognized, as well, that the direction of strategy is certainly a function, in part, of the kind of organization which produces it and the balance of power within the structure. Today's organization is an important influence in molding tomorrow's strategy which, in turn, shapes tomorrow's organization."

Similarly, budgeting and resource allocation decisions represent the distribution of the people and money needed to put marketing strategies into effect, but also provide signals about the strategic direction chosen and the priorities for managers. However, this view also cautions us to bear in mind that this form of communication is fraught with political risk and the planning intents of resource allocators may be ignored or subverted (Bower 1970; Newman 1975; Piercy 1987).

Another perspective frequently associated with marketing implementation is the matching of management style with the marketing strategy to be pursued, both in the technical sense and in terms of requisite "vision" and leadership in the desired direction.

Other issues conventionally considered are the translation of strategies into statements of organizational goals and missions as a way of communicating requirements, though it has been noted that this is problematic and frequently poorly done in practice (Piercy 1992; Piercy and Morgan 1994). Moreover, the ever tighter controls required to monitor progress are themselves an implementation barrier in many circumstances (Reed and Buckley 1988).

Limitations of Traditional Approaches to Marketing Implementation

Consider the underlying assumptions of such conventional administrative approaches. Perhaps most fundamental is the assumption that strategic marketing decisions are well understood and widely agreed upon within the organization (Skivington and Daft 1991). Evidence suggests that this is frequently—indeed, usually—not true (Hambrick 1983; Mintzberg and McHugh 1985). As well as the often divergent preferences of politically powerful players for alternative strategic directions or the *status quo* (Pfeffer 1981), managers are frequently not trained or prepared for the execution of plans, being generally "strategy-sophisticated and implementation-bound" (Bonoma 1985).

For these reasons, there has been some move towards analysing marketing implementation in terms of process within organizations, rather than (or, in addition to) constituting a matter of structural realignment and administrative direction. This, in turn, reveals a fundamental problem in the separation of marketing implementation issues from the process of formulating strategies—the "formulation–implementation dichotomy" (Cespedes 1991).

The Marketing Strategy Formulation–Implementation Dichotomy

Many of the difficulties associated with marketing implementation in practice appear to arise, not simply because of practical problems in management action, but because conventional approaches to the formulation of strategies have taken the view that marketing strategy development and marketing implementation are distinct and sequential activities. Where it exists, this "dichotomy" is fraught with dangers:

—It ignores (or often underestimates) the interaction between the process of marketing strategy formulation and an organization's unique implementation capabilities and constraints (Bonoma 1985).

—It reduces the ability of an organization to establish a marketing strategy which draws on its real core competencies, i.e. what it is best at in a particular market or industry (Hamel and Prahalad 1989).

—It risks divorcing the plans produced from the changing realities of the inner workings of the organization (Bonoma and Crittenden 1988; Hutt *et al.* 1988; Piercy 1992).

—It encourages the establishment of "professional planners" and the consequent "uncoupling" of strategy from operating plans (Hobbs and Heany 1977).

—It may rely too heavily on the rational–analytical belief that strategies are direct, and are chosen by management, rather than being emergent and growing from the experiences and preferences of the organization and its members (Mintzberg 1987; Hart 1992).

—It assumes that strategies are problematic and execution is not, which is the reverse of much managerial experience—knowing what to do is relatively easy compared to actually doing it (Bonoma 1992).

—It takes no account of the need for effective strategies to span internal boundaries between functional and organizational interest groups (Aldrich and Herker 1977; Spekman 1979; Ruekert and Walker 1987; Piercy and Morgan 1993).

—It underestimates the significance of the political and negotiating infrastructure within the organization, and its impact on the process of gaining the commitment of organizational members at all levels (Pfeffer 1981; Piercy 1985; Reed and Buckley 1988; Piercy and Morgan 1991).

—It largely ignores the potential for middle management "counterimplementation" efforts (Guth and MacMillan 1986).

—It generates increasing opportunity costs for firms, as "time-based" strategies place a premium on a firm's ability to implement plans more quickly than in previous stages of competition (Stalk and Hout 1990).

—Similarly, the formulation – implementation dichotomy can prevent a firm from realizing important first-mover or pioneer advantages as product life cycles become shorter (Easingwood 1988; von Braun 1990; Cespedes 1994).

—Finally, it has been suggested that the inherent advantage of any given marketing strategy itself is now subject to a shorter "window of opportunity", as global competition, rapid diffusion of technology, and information systems make imitation of successful strategies easier and quicker (Hamel and Prahalad 1989). This, in turn, means that competitive advantage is increasingly a function of a firm's ability to execute effectively a succession of appropriate, but increasingly short-lived, strategic initiatives.

The conclusions suggested by these arguments seem to be three-fold. First, there is a need to pay proactive attention to the *process* of how marketing strategy formulation and marketing implementation are linked within the organization. Second, marketing strategy implementation needs to be viewed in the broader context of *organizational change*, and the sources of potential resistance to change from different parts of the organization. Third, the management of marketing implementation may involve quite different mixes of *skills and abilities* from the formulation of plans and strategies, which has implications both for training and development, task allocation, and the linking of marketing strategy formulation and marketing implementation.

Figure 1 summarizes the main points underpinning this argument. In the conventional view of strategic marketing decision-making, issues are handled sequentially and marketing implementation is concerned with putting prior decisions into effect. The second model in Figure 1 is where marketing implementation is at least made a formal issue in planning—i.e. when strategies are formulated, attention is given to analysing their implementation requirements and barriers. The third model is one where there is integration between the processes of marketing strategy formulation and marketing implementation.

Understanding the Sources of Marketing Implementation Problems

Some marketing implementation barriers are relatively overt and identifiable but it is often necessary to pursue more covert issues that help explain why a marketing strategy that apparently "fits" the organization's capabilities, and is coherent and complete, may still fail in implementation. There are many reasons which may

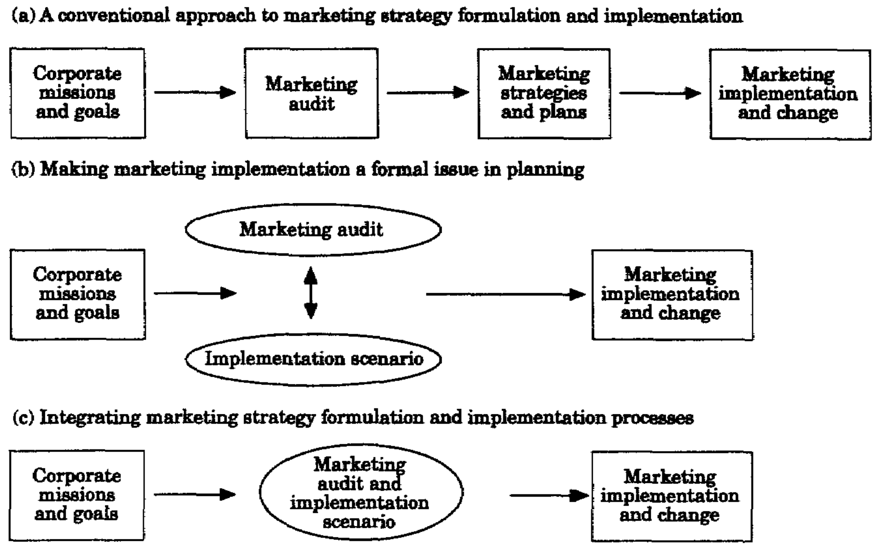

Figure 1. The marketing strategy formulation — implementation dichotomy.

explain a wide divergence in perceptions of the strategic "imperatives" and organizational "reality" facing a firm (Piercy 1992). Such issues can be organized for discussion into the following categories: organizational inertia; organizational myopia; active resistance to change; political interests; designed error; information flows; measurement systems; and time horizons.

Organizational Inertia

Organizational history provides a marketing implementation barrier insofar as the residue left from previous strategies provides an inappropriate context for the new strategy (Hobbs and Heany 1977). This may produce incompatible demands on managers, which they resolve generally by continuing past behaviours. In a similar way, Wernham (1984) analyses implementation problems in terms of the "organizational validity" of the strategy, i.e. its "fit" with the history of success or failure with similar developments in the past.

A related factor concerns the impact of "organizational routines" (Nelson and Winter 1982) or functional "thought worlds" (Dougherty 1992) on the implementation of strategic marketing initiatives. Different units within the same firm (e.g. marketing, manufacturing, sales, service, etc.) typically adopt routines, or standard operating procedures, that accelerate the performance of its subset of responsibilities. Provided these routines are coherently synchronized, and support the use of those procedures with the highest potential for customer satisfaction, this specialization is advantageous. But, in most busy organizations, the routines themselves are soon treated as fixed. The result can be a series of "competency traps" (Levitt and

March 1988) in which each organizational unit is unwittingly "fighting the last war"—i.e. executing tactics incompatible with the tactics of other units in the firm and often relevant to a previous stage of product-market competition (Cespedes 1995). Further, each unit's established procedures can keep the firm from gaining valuable experience with new procedures. Other alignments may be appropriate to changing market conditions and more necessary for effective marketing implementation. But "competency" is associated with established organizational routines and marketing implementation procedures. Cespedes (1993*a*) provides examples of this kind of implementation barrier from firms in contemporary consumer-goods industries.

Other observations emphasize the internal and external "inertial forces" that block the implementation of new strategies (Hannan and Freeman 1977; Ginsberg and Abrahamson 1991).

A common example of the impact of such inertial forces on marketing implementation occurs in the area of distribution strategy. Some researchers have labelled the phenomenon the "limiting commitments" that block the adoption and execution of new channel arrangements in the face of market changes (Cespedes *et al.* 1988). When a market is entered or a new product introduced, elements of a firm's distribution strategy tend to cohere around the particular market circumstances and strategic goals held at the time. Further, both the supplier and its resellers must make mutual commitments of capital, time, and other resources in order to establish the original distribution arrangements. As markets evolve, however, buyer criteria change and new channel strategies are typically required. But each dimension of the existing arrangement tends to cement established patterns, making it difficult for the supplier to alter its channel strategy. In practice, management often seeks to invest in existing channels (Cespedes 1988). The short-term incremental cost of utilizing existing arrangements is often lower than the start-up costs of a new channel (Davidson and McFetridge 1985). In addition, current distribution arrangements have often been in place for years, and may account for a large share of company or divisional revenues and profits. Hence, while the firm may maximize long-term profits from adopting a different distribution strategy, individual profit-centre managers will see their performance drop in the short term, and may thus block or resist the implementation of the new strategy (Corey *et al.* 1989).

Miller and Friesen (1980) summarize internal inertial pressures in the following terms:

—Organizational myths and ideologies tend to endure and have the effect of reinforcing past behaviour and encouraging its extension into the future.

—Programmes, goals and expectations grow up around the preferences and skills of the powerful in the organization, and are likely to favour the continuation of those preferences and skills in the future.

—To change strategic direction may involve the admission of failure and the weakening of a political base for some managers, as well as undermining the position of employees.

In short, to comprehend some marketing implementation barriers it is necessary to examine the past and the pressures which may encourage the organization and its people to favour the *status quo*.

Organizational Myopia

Another reason for marketing implementation problems lies in the development of what Hobbs and Heany (1977) call "faulty perspectives", where individual departments and specialists in the organization foster perceptions which are quite different from the broader view of the environment adopted in planning marketing strategies. This may be manifested as a dogged belief by many in the organization that planning is not "practical" but is just the head office "field of dreams", to which they feel little commitment or loyalty.

Ginsberg and Abrahamson (1991) link such problems to individuals' and groups' "cognitive biases". These include such factors as: the tendency among managers to seek out and give credibility only to information that confirms their preconceptions (Zaskind and Costello 1962); and, the parallel tendency to discount, criticize or ignore information that conflicts with those preconceptions (Nisbett and Ross 1980). At the level of the group, such biases and resistance are illustrated by the Janis (1972) study of "group think", where group processes were observed to be self-validating pressures towards conformity. Such managerial biases have been widely observed (e.g. Schwenk 1984; Jackson and Dutton 1988; Walsh 1988), and linked to a highly imperfect and biased process of "environmental enactment" (Weick 1969), i.e. the social creation of a view or construction of the external environment shaped by organizational and managerial characteristics.

Tendencies such as those described here may be approached through techniques of strategic issue identification (Dutton and Ottensmeyer 1987) and improved management of environmental scanning (Piercy 1992), rather than more direct managerial intervention. But it is also wise to bear in mind the possibility that, when implementation is blocked by those who have made a different assessment of the situation faced, they may be *right*, even though "this likelihood is not obvious to some managers who assume that resistance is always bad and therefore always fight it" (Kotter and Schlesinger 1979).

Active Resistance to Change in the Organization

Resistance to change by individuals and groups in organizations is a well-documented and analysed topic, for example see Caruth *et al.* (1985), Zaltman and Duncan (1977), Darling and Taylor (1989) and a useful summary is provided by Stanislao and Stanislao (1983). Approaches to meeting resistance to change are considered below.

Middle Management Resistance and Political Behaviour

The use of political power by managers to resolve conflicts of interest is contingent on: uncertainty; power differences; and dissensus about goals and cause-and-effect relationships (Thompson 1967; Pfeffer 1981, 1992). If these contingencies surround a marketing strategy—as they often do (Wernham 1984)—the use of power and political force is anticipated. This may be difficult to identify, since political effectiveness involves skills in obscuring the use of power, and rationalizing and legitimizing the course of action favoured (Pfeffer 1981). Kotter and Schesinger (1979) evaluate this factor as "parochial self-interest", involving change avoidance by public conflict or subtler, more covert, behaviour.

Guth and MacMillan (1986) have studied middle management "self-interest" in the context of strategy implementation and suggest that:

> "A particular strategy sponsored by general management can have predicted outcomes with low desirability to a substantial number of middle-level managers, and/or can have outcome predictions with which a significant number of middle-level managers do not agree ... This lack of commitment may not result only in passive compliance. Instead it could result in significant 'upward' intervention by the middle managers either during the strategy formulation process, or during the implementation of the strategy." (Guth and MacMillan 1986).

They argue that this type of middle management intervention may be active or passive. *Active intervention* by middle management to protect their political and vested interests may include: mounting campaigns of "persuasion" in meetings and in written media against the sponsored strategy; seeking to form alliances and coalitions with other members of the organization who will agree also to stand in opposition to the strategy; deliberately taking (or not preventing) ineffective action in implementation, or creating "roadblocks"; and, outright sabotage of the implementation to "prove" that the strategy was poorly constructed in the first place. *Passive intervention* by middle management may involve: giving low priority to the implementation of the strategy, compared to other activities; creating delays unnecessarily, to compromise the quality of the implementation, and possibly to postpone it beyond the time that it is likely to be effective anyway.

These managerial actions may be the hidden reasons for marketing implementation problems which are apparently explained by other more rational or legitimate reasons. If so, it is important that such behaviour is not simply denied because it is perceived to be "irrational" (Pfeffer 1981). The reality is that such behaviour places major constraints on what management can, in fact, "decide" and implement (e.g. Kanter 1977; MacMillan 1978; Quinn 1981).

Designed Error in the Organization

Argyris (1985) argues that many implementation failures occur "by design". Such "designed error" arises because organizations develop routines for implementing strategy, which are taken for granted and rarely challenged. In particular, although line management and strategic planners might question how well each side understands the "real" problems, they avoid the embarrassment and threat associated with discussing these differences, and they cover up that avoidance. This reflects an organizational defensive routine, i.e. "any policy, practice, or action that prevents the people involved from being embarrassed or threatened, and, at the same time, prevents them from learning how to reduce the causes of the embarrassment or threat" (Argyris 1985). Organizational defensive routines are overprotective and anti-learning, and favour the retention of the *status quo*.

A more sweeping perspective on designed error in organizations has been suggested by Hannan and Freeman (1989). Building on the seminal work by Lawrence and Lorsch (1967, 1986) concerning firms' simultaneous needs for "differentiation" and "integration", Freeman and Hannan postulate an inherent limitation on any one firm's ability to integrate its organizational units and, thus, effectively implement a chosen strategy. Their argument runs as follows: as integration among internal units occurs, differences between these units diminish, behaviours across each group tend to converge, and the result is that the organization exhibits greater reliability in performing its current activities, but the diversity of beliefs and behaviours necessary for further adaptation to market forces is lessened or eliminated. In this view, organizational capabilities are akin to ecological niches, and the forces that permit an organization to thrive in one set of circumstances inhibit its ability to thrive, or survive, in an altered environment.

Marketing implementation problems resulting from conditions such as those discussed above may be difficult to identify and understand in practice. Nevertheless, they should form part of our understanding of why marketing implementation may be ineffective, and suggest that strategic approaches to the marketing implementation process may involve broader issues of organizational development, not simply tactical responses and formal marketing implementation programmes around particular strategies.

Information Flows, Measurement Systems and Time Horizons

Other marketing implementation barriers often reside in the information, measurement, and career path infrastructure of firms. In most companies, execution of marketing strategy typically encompasses at least three groups: those who manage the firm's product offerings; those who manage the sales channels; and those responsible for pre-and post-sale customer services of various kinds. In a field study, Cespedes (1993*b*) found that these units differed in terms of: (1) information priorities and, hence, the types of data tracked by each unit; (2) the role and use of the data that was tracked; and (3) hardware and software systems used to disseminate information within and between these groups. Product managers viewed data about pertinent products and markets (defined as segments across geographical boundaries) as their highest information priorities. Sales managers sought data about geographically-defined markets and specific accounts and resellers within those markets. Service managers needed data about both products and accounts, but in different terms from the data categories most salient to product and sales units. Table 1 summarizes these and other differences that often affect the success and failure of marketing implementation efforts.

Among other things, these differing information flows mean that product, sales, and service managers often meet to discuss strategic goals and tactics on a reactive, rather than proactive, basis. Furthermore, each group tends to arrive at such meetings with ideas based on different data sources and with different assumptions about what is happening in "the market". In practice, it is difficult to integrate these

Table 1. ***Implementation differences between marketing groups***

Product management	*Field sales*	*Customer service*
Roles and responsibilities: Operate across geographical territories with specific product responsibilities.	*Roles and responsibilities:* Operate within geographical territories, with specific account assignments.	*Roles and responsibilities:* Operate within geographical territories, with multiple product/account assignments.
Time horizons driven by: Product development and introduction cycles. Internal planning and budgeting processes.	*Time horizons driven by:* Selling cycles at multiple accounts. External buying processes.	*Time horizons driven by:* Product installation/maintenance cycles. Field service processes.
Key performance criteria: Performance measures based on profit and loss and market share metrics.	*Key performance criteria:* Measures based primarily on annual, quarterly or monthly sales volume.	*Key performance criteria:* Measures vary, but typically "customer satisfaction" and cost efficiencies.
Information flows *Data priorities:* Aggregate data about products and markets (defined in terms of user segments).	*Data priorities:* Disaggregated data about geographical markets, specific accounts, and resellers.	*Data priorities:* Disaggregated data about product usage at accounts.
Key data uses: Roles of data makes compatibility with internal planning and budgeting categories a criterion of useful information.	*Key data uses:* Role of data makes compatibility with external buyers' categories important; "timely" data as a function of varied selling cycles at assigned accounts.	*Key data uses:* Role of data makes compatibility with relevant technical vocabularies a criterion of useful information.
Information systems: Often incompatible with sales and service systems.	*Information systems:* Often incompatible with product and service systems.	*Information systems:* Often incompatible with product and sales systems.

Source: Cespedes (1993*b*, p.29).

perspectives and provide effective implementation responses under such circumstances. In most companies, moreover, accounting systems track costs and other financial information primarily by product categories, rather than customer or channel categories (Johnson and Kaplan 1987). One result is often a gap between the aggregate data most meaningful to product planning activities and the disaggregated data essential to account- or region-specific implementation activities.

The organizational units most directly involved in field implementation of marketing strategy also often differ in terms of their measurement systems and time horizons. Sales personnel are most often measured in terms of sales volume (Moncrief 1986). In the setting of quotas, performance appraisals, and incentive pay, the focus of sales metrics in most firms is primarily on sales volume, rather than profit contribution or activities/tasks performed. Product management measures exhibit more variance, but profit responsibility, or forms of return-on-assets measures, are usually more prominent (Eccles and Novotny 1984). Customer service metrics also vary, but sales volume is rarely a prominent component, while service responsiveness, cost efficiencies, and (in recent years) "customer satisfaction" indices often loom large in service evaluations. These groups share many customer-contact activities, but their differing measurement systems can generate conflicts in the implementation of different aspects of joint tasks.

Similarly, these units also differ in terms of their members' time horizons. In consumer goods firms, for example, career paths in brand management have traditionally emphasized frequent rotation among product groups and an "up-or-out" promotion philosophy that puts a premium on individual brand managers' performance during their initial years with the firm. Meanwhile, salespeople at these firms typically stay much longer in a given territory with their assigned accounts. Promotion from sales representative to unit manager to district manager often takes a decade or more and does not entail "switching" accounts in the same manner that the mobile brand manager switches product assignments. Hence, each group approaches joint activities with different time lines in mind, and each may inhibit implementation efforts because the requisite "pay-off" from the marketing strategy may not mesh with that group's temporal perspective (Cespedes 1993*a*).

The groups' time horizons also differ along another important implementation dimension: where in the firm's value chain each group concentrates. Especially in industrial firms, product management usually has product development issues as a key concern, and any one product group must often compete with others for the firm's available R&D resources. Such a situation provides an incentive for individual product managers to "stretch" a proposed product's applicability across multiple customer segments in order to justify budget requests and drive development and production resources in their direction. The most common method for doing so is for product management to use information selectively: e.g. crafting segmentation schemes that highlight current or potential product leadership; choosing particular time periods for analysis and projections; or, simply focusing on data favourable to product proposals and omitting less favourable data (Cunningham and Clark 1975; Piercy 1987).

Cespedes (1995) uses the term "hierarchies of attention" to refer to these differences in information flows, measurement systems, and time horizons among the groups typically responsible for field implementation of strategic plans. These are differences in what each group takes for granted as part of its daily work, versus what it considers as "nice to have" or discretionary in its allocation of attention and effort. One result in many companies is explicit conflict or confusion in strategy implementation due to implicit disagreements about what constitutes "success" in performing joint activities. Managers in each group may well agree that success is ultimately defined by "the customer". But these hierarchies of attention mean that the groups that are jointly responsible for field implementation and customer satisfaction perceive "the" customer differently.

Marketing Implementation Tactics and Strategies

The review above indicates that the sources of marketing implementation problems may vary both in source and seriousness, and it is within this varied context that marketing management and marketing planners must operate. This variation suggests, in turn, that different types of responses may be most appropriate in

Table 2. Implementation tactics and strategies

Types of implementation approach (Nutt 1983)	*Implementation process models (Bourgeois and Brodwin 1984)*	*Implementation tactics observed (Nutt 1986)*	*Tactics to gain commitment (MacMillan 1978)*	*Emphasis of approach to implementation*
Unilateral Official edict Demonstration Replacement	*Commander Model* How do I formulate the optimum strategy?	*Edict* Orders are given	*Coercion* Use of management sanctions	Solving implementation problems by short-term action
	Change Model I have a strategy, now how do I implement it?	*Intervention* Managers are given authority to make changes	*Persuasion* Demonstrate benefits to those affected	
Manipulative Games Unfreeze–refreeze	*Collaborative Model* How do I involve management to get staff commitment?	*Persuasion* "Experts" must sell strategies to management	*Inducement* Build in extra payoffs	
	Cultural Model How do I involve the whole organization in implementation?		*Obligation* Trade on old favours owed	
Delegative Cooptation Participation	*Crescive Model* How do I encourage managers to come forward as champions of sound strategies?	*Participation* Delegation and cooptation		Developing the strategy process to integrate formulation and implementation

developing programmes and processes to address the marketing implementation problems identified in a particular situation. These issues will be considered below in evaluating the development of marketing implementation tactics and strategies.

We first discuss actions to consider in addressing the problem in conventional terms (i.e. achieving an already formulated marketing strategy in the face of execution problems), before turning to the broader issue of how to bring processes of marketing strategy formulation and implementation closer in an attempt to avoid the conventional dichotomy. This section therefore has the following structure, building from tactical to strategic issues in marketing implementation: Marketing Implementation Tactics; Meeting Resistance to Change; Management Execution Skills; and Marketing Implementation Strategy and Internal Marketing.

Marketing Implementation Tactics

Marketing implementation tactics are concerned primarily (though not exclusively) with actions managers take to achieve the strategies they have chosen. Table 2 summarizes a number of approaches to classifying marketing implementation tactics and strategies. These differ primarily in their relative emphasis on problem solution as opposed to problem avoidance in marketing implementation.

To start, Nutt (1983) suggests that implementation techniques can be unilateral, manipulative or delegated:

Unilateral tactics. Rely on the use of power by the implementor, who announces the change overtly and prescribes the expected behaviour. Typically this starts with an *official edict* by memorandum, presentation or instruction. If problems ensue, edict is followed by *demonstration*, to show the reluctant that the plan "works" and acceptance is required (Greiner 1970). Further problems are countered by a *replacement* approach to move or remove those blocking implementation, and then a *structural change*, to place those likely to implement the marketing strategy in question in key positions.

Manipulative tactics. Implementation can be viewed as a game (Bardach 1977) or an "unfreeze–refreeze" process (Schein 1961). The "freeze" analogy refers to three stages: unfreezing (attempts to reduce the strength of existing patterns of behaviour); changing (introducing the new skills and behaviour required); and refreezing (reinforcing the new patterns).

Delegative tactics. Aim at co-opting those involved in the change by involving them in various ways.

In broad terms, unilateral tactics follow the administrative assumptions discussed earlier; manipulative tactics are based on political approaches; and delegative tactics are more concerned with the strategy process issues to be addressed more fully below.

Bourgeois and Brodwin (1984) have identified five process approaches to strategy implementation.

The Commander Model. This model reflects a normative bias towards centralized direction, using conventional analytical techniques to select strategic direction, and organizational power to command implementation. In spite of its limitations, this model persists among consultants and managers because: it offers senior management strategic insight, even though potentially limited by implementability; it simplifies things for the manager; it enhances the power of the planner; and, it fits the rational–analytical paradigm of management "objectivity".

The Change Model. Here the manager is an "architect" whose major tools are using structure and staffing decisions to communicate the organization's new priorities and focus attention on desired areas, altering systems for planning, performance measurement, and/or incentive compensation to produce the behaviour required; and, cultural adaptation techniques to introduce organization-wide changes in behaviour and practices.

The Collaborative Model. Here, the manager acts as coordinator and the emphasis is on team-building at a senior level in the organization. However, this approach may substitute a politically feasible "negotiated" strategy for an optimal one, with subsequent costs in the marketplace.

The Cultural Model. Here, the emphasis is on implementing strategy through the infusion of a new corporate culture throughout the organization, with the manager cast mainly as "coach". The underlying principle is that, with an organizational ethos in place, the implementation problem is mostly solved, although possibly at the cost of much time in consensus decision-making and culture-building activities.

The Crescive Model. Here the emphasis is on the process of "growing" strategy within the organization, by drawing on the abilities of managers who run the business to create new strategies for that business. The senior manager functions as "premise-setter and judge" and the key question is "How do I encourage managers to come forward as champions of sound strategies?". The Crescive Model emphasizes maintaining the openness of the organization to new information; manipulating systems and structures in very general ways to encourage bottom-up strategy formation; intervening in the logical incrementalist way described by Quinn (1978); and, adjusting structure and staffing to minimize problems.

These process models can be seen as points on an important continuum. At one end of this scale, we are seeking appropriate tactics to drive through a chosen strategy; at the other end, we are seeking to integrate the processes of marketing strategy formulation and marketing strategy implementation (Figure 1). This corresponds to what Wernham (1984) describes as the difference between *solving* the implementation problem once it exists, and *avoiding* the implementation problem in the first place. Corresponding implementation tactics are described as: intervention; persuasion; and edict (Nutt 1986, 1987)—see Table 2.

More specific to the question of management commitment or motivation, Guth and MacMillan (1986) suggest that there are three primary sources of low managerial commitment to implementing a particular strategy: low perceived ability to perform successfully in implementing the strategy; low perceived probability that the proposed outcomes will result, even if individual performance is effective; and, low capacity of the outcome to satisfy individuals' goals and needs. They propose that, in managing implementation, each requires a different approach.

First, if the problem is that managers perceive an inability to execute the strategy, this may be countered by: training and development; support resources; and formal and informal encouragement.

Second, if the problem is that managers do not believe the strategy will work, approaches include: investigate middle management positions on the strategy, to understand clearly the basis for disagreement, and use this as a basis for focusing on *what* strategy is appropriate rather than *whose* strategy wins; and, fully identify the risks associated with the strategy and make explicit the cause/effect theories in use by different parties, to achieve "a more careful consideration of what is the right strategy rather than whose strategy is right" (Guth and MacMillan 1986).

Third, if the problem is that managers perceive that strategy outcomes will not satisfy individual goals, then there are four approaches open to management (MacMillan 1978):

—Inducement, build in additional payoffs to the strategy to win over low commitment managers;
—Persuasion, help managers to perceive payoffs they had not seen before;
—Coercion, use sanctions to change the perceptions of payoffs and risks in the implementation of the strategy; and
—Obligation, connect implementing the strategy to past favours owed.

Meeting Resistance to Change

The literature of resistance to change has grown in large part from the "human relations" school and such approaches are frequently characterized by consultation and consensus-building activities (Nielson 1981). A widely-quoted and systematic approach to dealing with resistance to change—which provides a useful link between the marketing strategy implementation process and change resistance—is provided by Kotter and Schlesinger (1979). They proposed a continuum of approaches, as suggested in Figure 2. The characteristics of their approaches to dealing with the resistance to change can be summarized as follows.

Education and communication. To help people see the need and logic for change. This approach is used where there is a lack of information and analysis. The assumption is that, once persuaded, commitment to change will be high, though at the cost of time.

Participation and involvement. Sharing some of the design and implementation of change with potential resistors. This approach is used where the initiators do not have all the information they need to design the change, and where others have considerable power to resist. The gain is commitment from those who participate

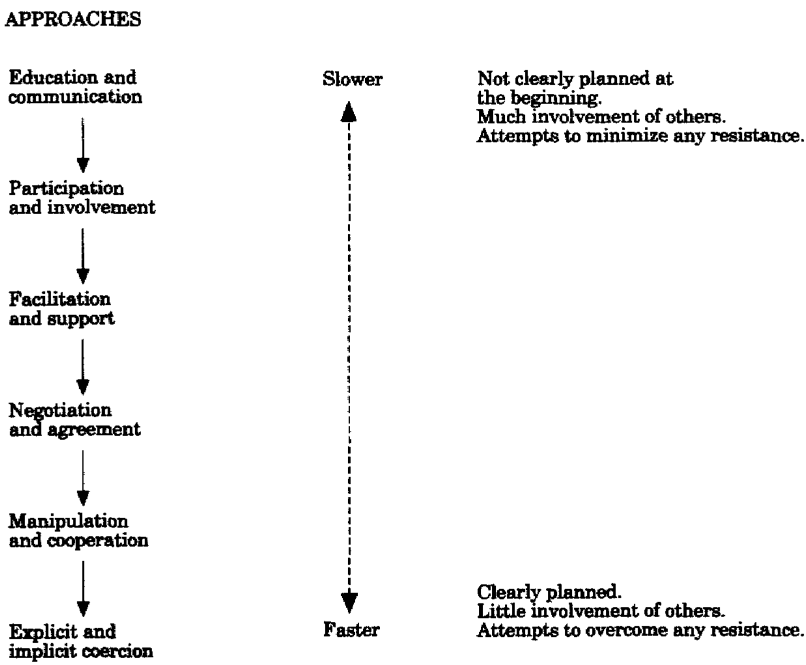

Figure 2. Methods for meeting resistance to change. Adapted from Kotter and Schlesinger (1979).

and access to their information, but at the cost of time and coping with inappropriate choices by participators.

Facilitation and support. Providing resources, encouragement and supportiveness to change resistors. This approach is used where people are resisting because of adjustment problems. It can be time-consuming, expensive and still fail.

Negotiation and agreement. Offering incentives to active or potential resistors. This approach is used where an individual or group will lose as a result of the change, and has power to resist. It may mitigate major resistance, but can also encourage others to bargain.

Manipulation and cooptation. Involving attempts to influence through selective information and by giving key roles to individuals or groups to gain their visible endorsement of the change. This approach is used where other tactics will not work, or are too expensive. It can be quick and relatively inexpensive, but people may feel manipulated.

Explicit and implicit coercion. Forcing the change through threat or use of sanctions. This approach is used where speed is essential and the change initiators have considerable power. The advantage is speed, but it may leave bad feelings for the future.

This typology emphasizes: (1) the amount and type of resistance that is anticipated; (2) the position of the initiator relative to the resistors, particularly with regard to power; (3) who has the relevant information; (4) who has the energy and time for the project; and (5) the stakes involved.

Management Execution Skills

As well as the development of tactics and actions to secure adoption of strategies, there remains the reality that the way in which the marketing strategy implementation process is *managed* at an inter-personal level may be a critical determinant of marketing implementation success, and may even represent the substitution of personal skills for formal structures and policies (Bonoma and Crittenden 1988). Bonoma (1984) has argued that managers need four critical execution skills:

—Interacting;
—Allocating;
—Monitoring; and
—Organizing.

Interacting skills. These refer to the manager's behaviour style and influence over other peoples' behaviour, including leadership by example and role model, the use of power, and negotiating and bargaining. The emphasis may be on themes—i.e. a shared vision of key goals and competencies—and a bias for action.

Allocating skills. These involve approaches taken to budgeting time, money and people, to achieve implementation of the high priority items, not the pursuit of equity and administrative "neatness" in resource allocation systems.

Monitoring skills. These involve developing and using feedback mechanisms that focus on the critical issues for success — which may not be the information provided by formal systems.

Organizing skills. These are concerned with a manager's "networking" behaviour that may involve going around the formal structure to achieve marketing strategy implementation. Bonoma (1984) observes that managers who are effective implementors "customize their informal organization to facilitate good execution. Often, their organization and the formal one have little in common".

The force of this argument comes from the observation that formal structures and systems are often inadequate and inappropriate for implementing new strategies. This is particularly true when external change rates and task complexity are high. The role of management execution skills is therefore to "bridge the gap" between marketing strategy and structure, until new systems and structures (which take time to develop) are instituted in the firm.

Marketing Implementation Strategy and Internal Marketing

Attention turns now to the broader questions of avoiding the emergence of implementation problems (Wernham 1984), in the way described by the Bourgeois and Brodwin (1984) Cultural and Crescive models of strategy process (Table 2). Although this is not a well-structured area of knowledge, the following issues can be considered: Participation in the strategy process; Strategic understanding in the organization; Champions and leaders; Shaping the strategy process; The learning organization; Liaison units; Career paths and management development programmes; and Internal marketing.

Participation. Participation of line management and other employees in marketing planning has been advocated as a way of achieving the commitment of line managers to the implementation of plans, and their "ownership" of the problems of execution (e.g. Reid 1990). If successful, this route would provide a basis for removing the "formulation–implementation dichotomy" discussed earlier. Different forms of participation were discussed by Nutt (1987) as tactics for coopting the powerful and influential and lessening their resistance to strategic change. However, participation in planning process in the fuller sense discussed by Bourgeois and Brodwin (1984), or more recently by Giles (1991), is a broader processual question more relevant to building a longer-term strategy for organizational change and marketing strategy implementation. This may be compared to "organizational socialization" of various types, in which people learn and internalize organizational goals and values pertinent to the marketing strategy implementation process (e.g. see Van Maanen 1978; Hartline and Ferrell 1994).

Strategic understanding in the organization. This is concerned with the perception by organizational members of the environment which they face, and the strategic assumptions they make. This is partly a cultural issue which reflects, not "the way we do things here", but "the way we look at things here" (e.g. see Piercy 1992). It may involve sharing processes like environmental scanning and strategic issue analysis with those in the organization who will be affected by the strategic changes implied, and whose commitment to change is most important (e.g. see Dutton and Ottensmeyer 1987; Dutton and Duncan 1987; Piercy 1992). Indeed, it has been suggested that some "corporations have created a world in which managers not only cannot see what is salient in their markets, they have gradually become impervious to learning" (Martin 1993), and a critical skill becomes "unlearning" the past (Brown 1991). In a longitudinal study focused on field implementation of marketing strategy in a fast-changing, high-technology environment, Cespedes (1990) identifies a key tension facing companies in marketing strategy implementation: how to embed new skills in the organization with minimal disruption to the efforts and attention required to maintain current sources of revenue. His study indicates how organizational structures and reorganizations can simultaneously be an impediment to learning and a necessary means of "unlearning" accrued skills and habits.

Champions and leaders. Champions and leaders may be critical to implementation, yet actively discouraged by the organization. Change-agents of this type have been variously described as "monomaniacs with a mission" (Drucker 1979), "change masters", or "corporate entrepreneurs" (Kanter 1983), "mavericks" or "rebels" (Sathe 1988), "fixers" (Peters and Austin 1986), or "subversives" (Bonoma 1986). The key question would seem to be the degree to which an organization is able to facilitate and nurture the development of such players and to build its longer term implementation capabilities, while retaining necessary questioning and flexibility in the organization. This extends beyond this issue of individual project execution tactics in the short term.

Shaping the strategy process. This is concerned with the operation of the process of marketing strategy formulation in the organization, and the ways in which this may be designed to avoid marketing implementation problems (Piercy and Giles 1989; Giles 1991; Piercy 1992). The underlying proposal is that planning should start with the understanding of the environment held by line management, and work back to generate strategies for the future. This relies on an iterative approach, and involves typically sacrificing sophistication in plans for commitment and enthusiasm in planning and execution. Case examples can be found in the source cited above, and these demonstrate the potential long-term gains from such redesigns of traditional planning processes.

The learning organization. The learning organization and the use of organizational development techniques to avoid implementation issues is discussed by Argyris (1985). Argyris (1989) describes a form of organizational development programme where managers and their subordinates work together in a training environment to produce: (1) a strategy; (2) a definition of some of the human problems that occur during implementation; (3) the formulation of steps to overcome the problems; and (4) the monitoring of implementation. The role of planning in the "learning organization" is not well understood at present (e.g. see Garvin 1993; Slater and Narver 1994), but it seems probable that the knowledge development function (information acquisition, information dissemination and shared interpretation) and the growth of "generative learning" will offer some new approaches to avoiding the "formulation–implementation dichotomy" in the marketing strategy process in organizations of the future.

Liaison units. To help address the differences in information flows and measurement systems that often impede implementation efforts, some firms have established formal liaison units focused on various dimensions of strategy implementation. Many companies have long had headquarters units whose ostensible responsibility has been to coordinate implementation activities among various functional groups. But as integration requirements have increased in many industries, some companies have reorganized these groups and expanded the scope of their responsibilities [see Cespedes (1995) for specific examples].

One benefit of establishing such units is that they clearly signal the importance of cross-functional collaboration in companies where product, sales, and customer service activities have long resided in separate departments, each with its own measurement systems, career paths, and operating procedures. Usually staffed by personnel from these various departments, these units also help to integrate divergent information flows. They also provide a specific decision-making mechanism in an environment where important trade-offs and implementation decisions increasingly reside at the interface between functional groups, rather than within each group's traditional domain of expertise. One study of the operations of such groups stresses the analogy with quality initiatives: such units, as one manager commented, help "to make visible issues that cut across product and sales groups, just as quality circles helped to build our awareness of the cross-functional requirements of total quality management" (Cespedes 1993*a*).

Career paths and management development programmes. A key to building the skills and capabilities required for implementation is a set of human resource management (HRM) initiatives that broaden perspectives, build inter-unit experience, and establish relationships that encourage and support appropriate behaviour. Some companies have revised HRM policies with these aims in mind. According to Cespedes (1995), they have found that these initiatives do not simply adapt implementation tactics to established structural and information characteristics of these firms. Rather, two aspects of HRM policy — career pathing and training and development activities — are especially important in determining whether and how organizational systems required for implementation are used, maintained, and kept up-to-date.

Some firms have altered traditional career paths with implementation efficiencies in mind. These companies provide assignments in both sales and product management positions, for example. Others have expanded the lengths and type of field sales exposure required for personnel in product development or production. In addition, new positions in many firms focus managers explicitly on joint, cross-functional issues and activities. One benefit of these career path initiatives is increased awareness of another organizational unit's operating conditions, constraints, and contributions. Managers with both product management and sales experience, for example, are more likely to develop strategies and implementation programmes with an awareness of the reciprocal requirements. Such assignments also help to build what Kotter (1990) calls the "thick informal networks one finds wherever multiple leadership initiatives work in harmony... Too often these networks are highly fragmented: a tight network exists inside the marketing group and inside R&D, but not across the two departments."

Other companies have altered the form and content of their management development programmes. These firms use redesigned programmes as a way to build recognition of the need for implementation linkages, develop a shared understanding of each area's contribution to customer satisfaction, and broaden the individual relationships that are needed for effective field execution of strategies. Cespedes (1995) cites the following characteristics of successful initiatives in this area. First, these programmes are typically defined and designed as company-specific endeavours intended to promote a change in attitudes and orientation as well as in skill sets of individual managers. The line between cultural transformation and traditional management education blurs (Tichy and Devanna 1990), and customization of programme content becomes essential. Second, while top management attended, these programmes typically included managers at various levels of the firms involved. Indeed, a major benefit is often the education *of* top managers *by* front-line managers about changing implementation requirements. Third, these programmes usually complemented traditional classroom and case-study instruction with actual projects about implementation issues at the firm. Often billed as exercises in "action learning", these programmes were influenced by TQM doctrine and its emphasis on the "Plan, Do, Check, Act" cycle required for systematic problem-solving. The assumption is that an effective learning programme for marketing strategy implementation must develop skills and shared awareness in the context of meaningful business issues. Either alone is inadequate.

A development initiative illustrating these characteristics is the WorkOut programmes begun at General Electric in 1989. Company-specific in focus, cross-functional in the composition of participants, and project-driven in agenda, these sessions deal with various issues within GE's many business units. Many WorkOut programmes involve the need for better integration of product, sales, and service units in the context of global competition, lower-priced alternatives, and flat or shrinking headcount in many GE businesses. Chairman John Welch has been explicit about the marketing implementation challenge facing his firm: "even in a horizontal structure you'll still have product managers, still need accountability. But the lines [between various functional units] will blur" (Stewart 1991). Hence, many WorkOut programmes at GE concern the development of cross-functional implementation programmes with customers in the context of a corporation with a heritage of autonomous, functionally-oriented product, sales, and service units (Jick 1992).

Internal marketing. Lastly, one approach which may have operational use in integrating the insights gained from considering the arguments above is the development of an internal marketing strategy to address implementation issues (Piercy 1992). This provides a framework which can span the gap from simply addressing implementation barriers to designing ways to avoid the emergence of such barriers to marketing strategies. Examples of companies using this approach to mirror their external marketing strategies with an internal marketing strategy can be found in Piercy and Morgan (1991).

Conclusions

There are no "quick-fixes" available to remove the marketing implementation issue from the management agenda. Similarly, there are no unified, simplifying models which capture the issue in an holistic way.

This paper has attempted to highlight the major sources and types of marketing implementation problems and what is known about the development of appropriate managerial responses. Underlying the approach here is the argument that one of the fundamental problems faced is the organizational and managerial separation of marketing strategy generation and execution processes—the "formulation–implementation dichotomy". Another conclusion is that it is efforts to reduce or remove this dichotomy which will ultimately hold the key to the marketing implementation problem.

The management agenda suggested by this analysis is one which requires marketing executives to consider the following types of issue in addressing the implementation question:

—How well have traditional approaches to marketing implementation worked in executing marketing strategies—a strategic gap analysis may be useful in answering the question (Piercy 1992)?

—How and where are issues of implementation addressed in the process of developing marketing strategies? For example, which of the models in Figure 1 is the best descriptor, and is this an issue requiring longer-term attention?

—In examining performance in gaining the effective implementation of marketing strategies, can problems be traced to the underlying sources examined here—organizational inertia, organizational myopia, active resistance to change, political interests, designed error, information flows, measurement systems and time horizons—and what does this suggest is needed for the future?

—What do these conclusions suggest is needed in terms of developing marketing implementation tactics and strategies—to solve implementation problems and to avoid the emergence of such barriers? Underlying this, what are the most important issues of process to be addressed in marketing strategy formulation, and how may these be managed to reduce to a minimum the corporate barriers to change and innovation?

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