


Strategies for improvement in marketing planning: A case study in the company PDCM

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ABSTRACT

This article aims to present proposals for the optimization of the strategic marketing planning process in the PDCM company, adopting methods for a better development of the marketing strategy in the organization. Strategic marketing planning is a process of controllable and uncontrollable variables that affect the exchange relationships between companies. Modern organizations participate in constant technological changes and evolutions, in the growth and segmentation of markets, and therefore need strategies to beat competitors by reinforcing their links with their respective markets and establishing a link between the company and its consumers. Factors considered relevant for the elaboration of the article were the historical context of strategy and planning, conceptual aspects related to the subject and research based on lines of thought of renowned authors in the area, resulting in the structuring of a roadmap for the step-by-step development of an objective and easy-to-implement strategic plan.

Keywords: Marketing, Planning, Strategy.

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INTRODUCTION

The company PDCM – NTC object of study, is a company specialized in Basic Baskets, has been in the market for sixteen years, with the objective of providing the best products according to the customer's needs, always presenting quality in service.

The theme of the solution proposal arose from the realization of the organizational diagnosis work applied in the NUT company, which through data collection, and analysis of information made it possible to visualize all areas of the company, and allowed it to choose the area in which we will work to solve the problem. In view of the facts presented, the following question was formulated: How to optimize the strategic marketing planning in the PDCM company?

The choice of this problem was due to the fact that the company PDCM presents the weak points and points to improve in the strategic marketing planning, having some unsatisfactory points in the marketing strategy.

To solve this problem, the following objectives were defined: General objective: To propose the implementation of the strategic marketing planning of the PDCM company. And the specific objectives: a) To collect data on strategic marketing planning; Establish a strategy for the implementation of planning; Propose actions to optimize strategic marketing planning.

To base the solution project that deals with internal communication and an initial roadmap of the concept of planning and Marketing, types of planning and we will enter the focus of our work, which is Strategic Marketing Planning.

In the methodology, in this case, the instruments interview script, direct observation, and questionnaires were used to obtain the information for the elaboration of the solution proposal.

At the end, a solution proposal will be presented containing all the steps to solve the problem with the planning of the solution proposal and its respective stages involving time and cost.

STRATEGIC PLANNING AS A PILLAR

Strategic planning is the administrative process that provides methodological support to establish the best direction to be followed by the company, aiming at the optimized degree of interaction with external factors – not controllable – and acting in an innovative and differentiated way.

The basis of (Oliveira, 2013) states that strategic planning is usually the responsibility of the highest levels of the company and concerns both the formulation of objectives and the selection of courses of action – strategies – to be followed for its consolidation, taking into account the external and internal conditions of the company and its expected evolution.

Initially, an internal and external analysis of the organizational environment is necessary, with the identification of strengths and weaknesses as internal elements of the organization and the



external environment, the priority is to identify market opportunities and the numerous existing threats, as (Thompson and Strickland, 2003).

According to (Hara, 2003), strategic planning is the administrative process to develop and maintain a viability between organizational objectives and constantly changing market resources and opportunities. The goal of strategic planning is to set up and reconfigure the company's business and its products so that they combine profit production and growth. Thus, it is worth highlighting the importance of strategic planning to effectively direct an organization with clear objectives and specific goals for a desirable future, involving formulation, implementation and establishing long-term objectives (Kaplan and Norton, 1996), in this way, the priority is always continuous learning.

STRATEGIC MARKETING PLANNING

The process of strategic marketing planning can be complex or relatively simple. Strategic planning for a corporation divisions is more intricate than the marketing planning of a single-owner company. Although the problems are different, the planning process is the same in many ways, and essentially, the goals and objectives can be similar. In large or small companies, while achieving the objectives of their own business and marketing, for (Las Casas, 1999) strategic marketing planning carries out the goals of the organization and its resources together with market opportunities in the area of marketing.

It is worth mentioning that a well-planned marketing process presents a great participation, qualification of employees to understand, create and generate value for the customer, (Kotler, 2012). One way to think about the marketing planning process is to see it as a funnel. At the top are important corporate decisions related to the company's mission, vision, and goals, and resource allocation among business units. Planning at this level also involves decisions about whether to acquire or divest the business units themselves. These decisions trickle down the funnel to the business unit level, where planning focuses on achieving goals and objectives within decisions made at the corporate level and being consistent with them. However, in organizations that have only one business unit, the corporate strategy and the business unit strategy are the same thing.

Planning and more specific decisions take place at the bottom of the funnel. It is at this level that organizations make and implement tactical decisions regarding marketing strategy (the target markets and the marketing mix) and marketing plans. According to (Kotler and Keller, 2016), the generation and creation of value and sustainable competitive advantages is a priority in strategic marketing planning.



MARKETING IN THE ORGANIZATION

Marketing is a great process, strategies, performance and realization that companies apply to communication, creativity and granting value to the customer, in this way, it is ensuring the relationship with the customer, privileging the organization and the people involved. The joint realization of institutional processes for the creation, dissemination, delivery and transfer of a proposal with added value for customers, employees and society as a whole and the definition of marketing by the American Marketing Association (AMA, 2022).

The interest in marketing in organizations is essential to know and integrate the company with consumers and the market, thus, for the prominence of the brand, preference and stimulus in sales is a function of marketing according to (Baines and Fill, 2017). Marketing involves identifying and satisfying human and social needs. One of the most succinct and best definitions of marketing is that of "meeting needs by generating profit". We can establish definitions of marketing from the social and managerial perspectives. A social definition shows the role of marketing in society, for example, a professional in the area stated that the role of marketing is to "provide a better standard of living".

From a managerial perspective, marketing is often described as "the art of selling products," but many are surprised to hear that the most important part of marketing is not selling! Sales are the tip of the marketing iceberg. Peter Drucker, one of the leading management theorists, presents the issue as follows: It can be considered that there will always be a need to sell. But the goal of marketing is to make superfluous and sales effort. The goal of marketing is to know and understand the customer so well that the product or service can suit them and sell itself. Ideally, marketing should result in a customer willing to buy. The only thing needed, then, would be to make the product available. (Hara, 2003) states that marketing is to understand and comprehend the needs of customers, always valuing a product or service that meets the needs and affirms the organizational objectives.

The process for implementing marketing strategies in an organization is above all a great investigation of numerous factors that may have internal, external, financial limitations and with major digital transformations in a constantly growing world with the demand for quick and assertive responses. The studies of (Morgan et al., 2018) direct that an interaction between sales and the marketing department is necessary, otherwise, the end result can be a low amplitude of advertising campaigns and inefficient strategies to reach the customer, resulting in a valuable loss of advancing the market with the conquest of customers.

It is worth mentioning the difficulties inherent in marketing initiatives along with the organization's objectives such as revenue, growth, and exploration of new markets, which can be an



aggravating factor in connecting marketing performance to the company's large-scale objectives (Wind, 2022).

From this perspective, marketing is parallel and other business functions such as production, research, general management, human resources, and accounting. As a function of business, the goal of marketing is to connect the organization with its customers. Other people, particularly those who perform marketing tasks, tend to view it as a process of managing the flow of products from the place of conception to the place of consumption.

THE USE OF THE MARKETING PLAN IN ORGANIZATIONS

A good marketing plan requires a lot of information from a number of different sources. An important consideration when gathering all of this information is to keep a bird's-eye view while paying attention to the details. This requires looking at the marketing plan holistically, rather than as a set of related elements. Unfortunately, adopting a holistic perspective is particularly difficult in practice. It's easy to get deeply involved in developing a marketing strategy only to later find that it's inadequate for the organization's resources or marketing environment.

The indication that a marketing plan has been well developed is its ability to accomplish stated goals and objectives. According to (Ferrell, 2009) when undertaking a business, whether it is a product or service, the day-to-day with financial limitations, growth in a sustainable way, in parallel with people management and the risks and uncertainties of the market, it is necessary and extensive that can detail the perspectives of an organization.

For (McDonald and Wilson, 2013) the market opportunities of an organization enable the more effective elaboration of a well-structured marketing plan, in addition, decision-making in a more assertive way is facilitated with the allocation of financial resources and labor according to (Homburg, Jozić and Kuehnl, 2009). Thus, the remarkable importance of the marketing plan for the organization in organizing the marketing activities with the strategic planning of the organization.

The application of the marketing plan covers the applicability in the development practice and methods to achieve the purposes of the organization's marketing area. This support is necessary for the identification, idealization and implementation of advertising campaigns, dissemination, pricing and other marketing actions, according to (Wood, 2017). By highlighting that the marketing plan must be changeable, since adjustments and adaptations are necessary according to the market and the results achieved, highlighting that the effectiveness of the marketing plan is necessary for a continuous and coherent evaluation, aiming to achieve the established goals, as (Armstrong and Cunningham, 2020).



PLANNING TOOLS

The tools applied during the study that were most relevant for the conclusion of the results will be presented.

Elseograma

The flowchart uses a set of standardized symbols to represent the stages of the process, the people or sectors involved, the sequence of operations and the circulation of data and documents, (Alves, 2012) explains that the graphic representation through a mapping of several periods in a continuous and rational way, showing in a broad way the flow of a process, which enables management in an agile way and identifies possible failures and situations for improvement.

For (Kinga, Lima and Costa, 2014) the application of the flowchart is necessary for the mapping of a process, ensuring standardization and the absence of product defects. With regard to (Carvalho and Rabechini Junior, 2015) the allocation of resources and the monitoring of growth requires the help of a flowchart, as a versatile tool with its applicability in various segments of organizational management.

Goal Setting

All companies currently have a planned future, for this they have set objectives and goals to achieve them, to turn a dream into reality through the efforts and resources that over time companies can conquer, for (Costa, 2007) the goal are fundamental principles and standards that can be quantitative and qualitative to be achieved at a given time.

METHODOLOGY

This scientific article was prepared through research carried out through planned technical visits with the application of instruments for the development of the project.

The first visit used a document collection method, with the aid of a document analysis Chek List to collect information on documents related to the organization, with the objective of systematizing and analyzing them.

In the second visit, an interview was applied with a questionnaire of ten (10) questions for the company's Owner-Director and with a person from the administrative sector, whose objective was to obtain qualitative information aimed at strategic marketing planning, among others.

According to (Marconi and Lakatos, 2008), an interview is a meeting between two people, so that one of them obtains information about a certain subject, through a conversation of a professional nature.



On the third visit, a direct observation survey was carried out at the company Ntc, with the objective of gathering information and observing the organizational structure, as well as the opinion of employees regarding the company's strategic marketing planning. In this direct observation analysis, the points to improve in the organization's marketing were analyzed.

DOCUMENTARY ANALYSIS

For (Severino, 2007) of documentary research, the source is documents in the broad sense, that is, not only printed documents, but especially other types of documents, such as newspapers, photos, films, recordings, legal documents. Depending on the objectives outlined, documentary analysis will be carried out with the help of a Check List of documentary analysis, where documents of important relevance to the research will be requested.

INTERVIEW

As stated by (Marconi and Lakatos, 2008), an interview is a meeting between two people, so that one of them obtains information about a certain subject, through a conversation of a professional nature.

The interview for information collection and analysis will be carried out with the Director owner of the company, and with another person who is part of the administrative sector. The interview will be guided by a script previously prepared by the researchers.

DIRECT OBSERVATION

According to (Marconi and Lakatos, 2008) Direct observation is carried out through two techniques: observation and interview. A field visit will be carried out at the company, where researchers with an already prepared script will have the opportunity to make relevant observations for the collection of information.

This process was very important for them to obtain the necessary information, together with the representatives of the Ntc company, regarding the main processes, such as weaknesses, strengths, among others.

Therefore, based on these processes and follow-ups, it was possible to conclude this article and contributed to the elaboration of the proposal for the implementation of strategic planning and improvements to the company.



INCOME STATEMENT

It is in the statement of results that it finds a way to demonstrate that the entire process done resulted in improvements or not for the company, in a summarized and orderly way the data collected by the instruments used, which informed the main facts recorded, are presented.

For this project, the following general objective was defined as a solution proposal: To propose the improvement of the strategic marketing planning in the company Paulo da Silva, contributing to the improvement of the existing processes established in the company.

Strategic marketing planning is focused on the act of thinking and making plans in a more strategic way, due to the possibility of growth, generating good results for the organization.

PDCM is a company that cares about its employees, the good structure that directly or indirectly influences the good organizational climate that the company already has. We analyzed the current flowchart of the aforementioned company in which specific goals and objectives were established for an improvement proposal.

Which were as follows:

- Collect data on strategic marketing planning;
- Establish a strategy for the implementation of planning;
- Propose actions to optimize strategic marketing planning.

Goal 1 – Improvements in the current process of how strategic planning is being applied internally.

Goal 2 – Analyze the projects applied, their strengths and weaknesses, the project aims to implement processes in which it will develop the strategic marketing work in the company.

Goal 3 – Once implemented, promote incentive lectures for employees and training such as specialized courses in the areas of activity. Therefore, it is through these statements that its main objectives are achieved, aiming to provide information to the manager for decision-making.

Based on the concepts of an improvement proposal, which aim to look for the main causes and possible solutions, thus allowing a broad and integrated view of the company/organization. In this sense, it seeks to overcome obstacles and better direct investments, in the face of a specific problem.

Based on the data collected in the surveys, possible solutions to problems related to the company's strategic marketing planning are sought. Based on the above, some demands were detected regarding the marketing of the company Ntc. The company has a website that does not show much information to the customer, as well as the look of the organization did not look good. However, during this project, the company underwent a major change, both in its operational staff, in the field of activity, as well as in infrastructure.



It was observed that in the current process flowchart the activities were done in summarized ways, so it was proposed to improve sales activities, so that there is a more detailed flow of activities to be carried out, and aiming at a better monitoring of the processes.

The Flowchart aims to identify the real and ideal path for a product or service in order to identify deviations. According to (Marshall Junior et al. 2008) it is a graphic representation that allows easy visualization of the steps of a process.

It presents the logical sequence and chain of activities and decisions, in order to obtain an integrated view of the flow of a technical, administrative or managerial process, which allows the performance of critical analysis to detect failures and opportunities for improvement".

In other words: it is the graphic representation of the sequence of a task, system or work routine, identifying the processing and correlating it with the organizational units that the sectors perform them.

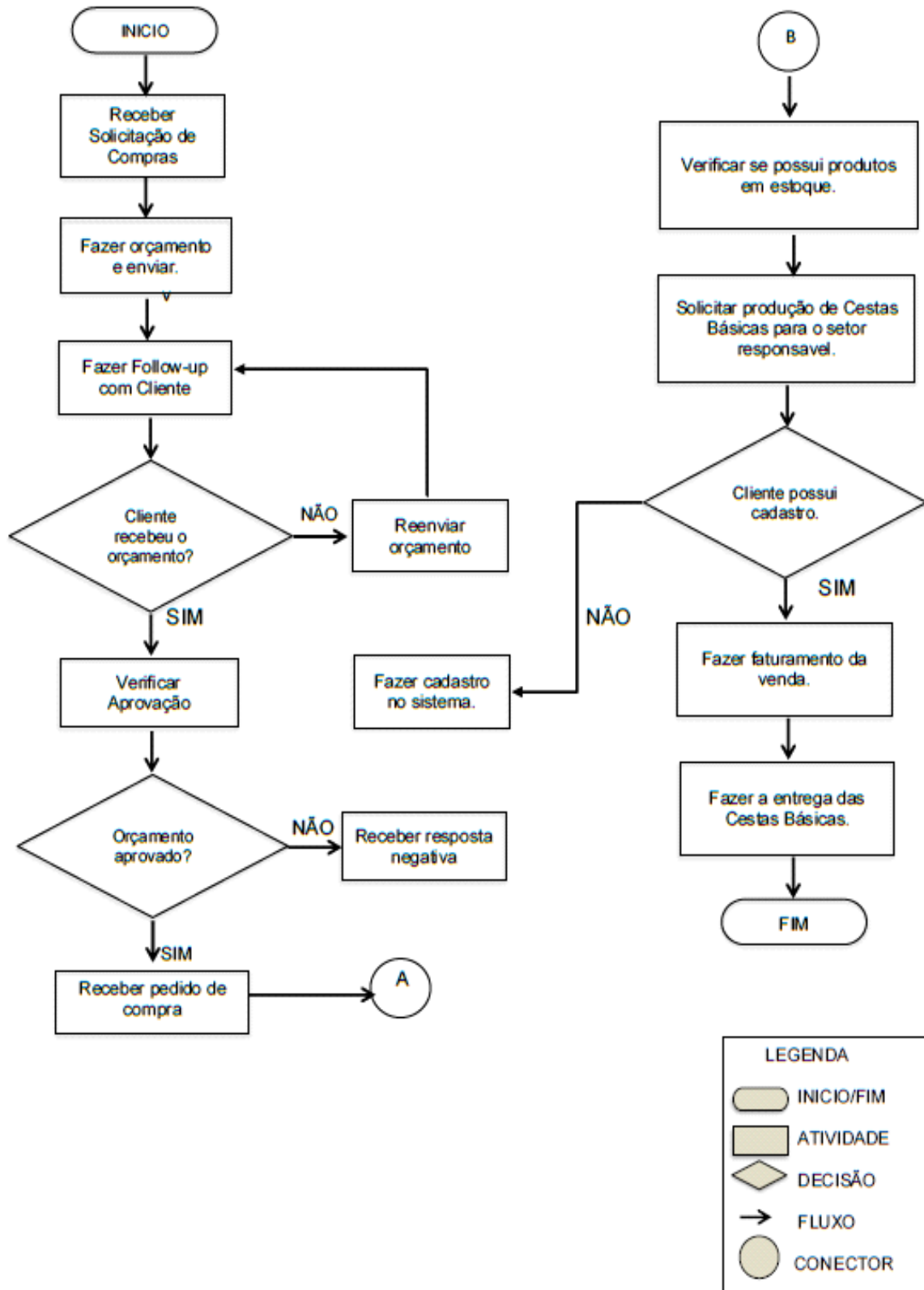
It is a sequential illustration of all the steps in a process, showing how each step is related. It uses easily recognized symbols to denote the different types of operations in a process.

The proposed flowchart was made in order to facilitate the organization of work within the Ntc company, so that the customer can make their requests and with the help of a system that allows the attendant to speed up the fulfillment of the necessary demands until delivery to the desired address. With these improvements, customers would be satisfied in terms of agility and fulfillment of their orders;

This flowchart must be made clearly so that all employees can understand the flow of the process. In such a way that this established process facilitates the focus of the activities of those who perform them.

The flowchart is not limited only to the activities of a process, but also to the people involved in it, as well as the departments and sectors. (Clarke, 2001) completes the statement by emphasizing that this graphic and detailed representation in a sequential way that identifies the processes.

Figure 03: Proposed Flowchart



Source: Lima and Pereira, 2023.

In the Gráf. 01 of Ishikawa are represented the problematic factors of the Paulo da Silva Company, where it can be observed:

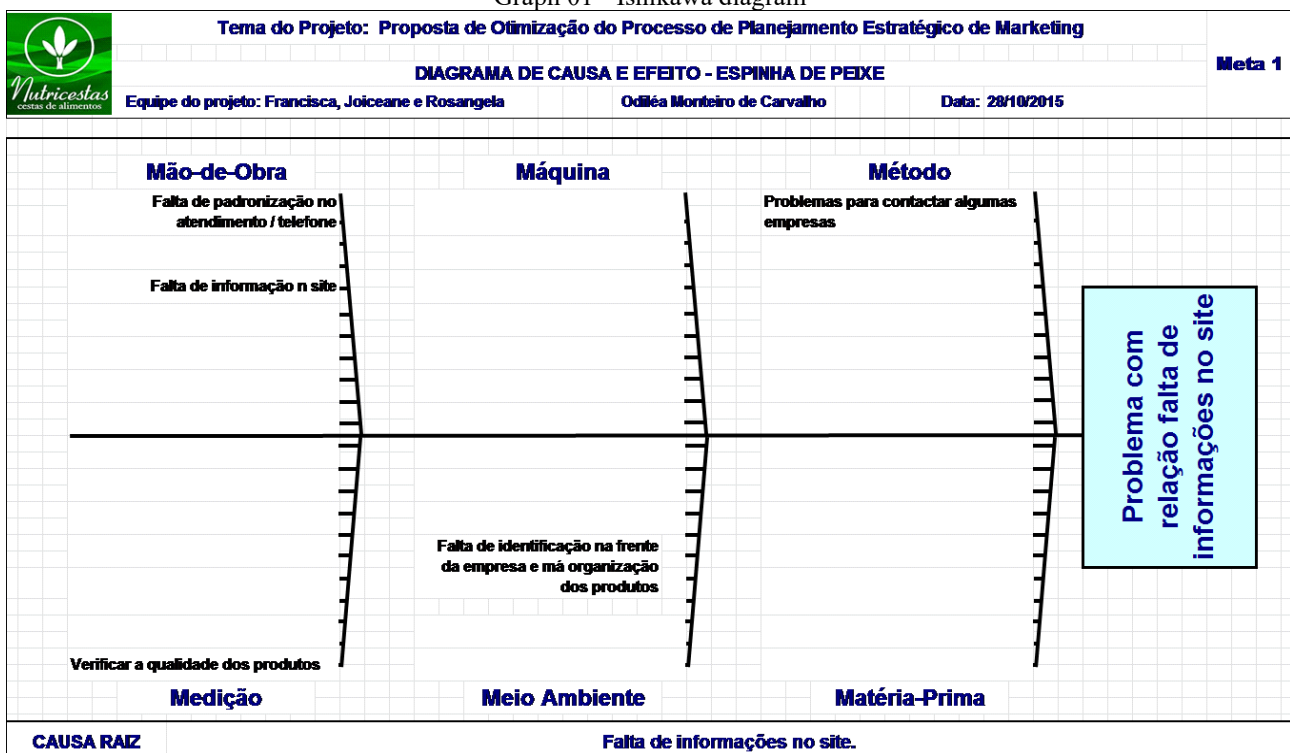
Also known as the Fishbone Diagram, its purpose is to explore and indicate all the possible causes of a specific condition or problem. For (Aguiar, 2006) it is often applied to identify the problem and how it will be necessary to evidence corrective actions.

In the graph presented, the Ntc Company presents several problems, where the following can be highlighted: the lack of standardization in the service/telephone, lack of identification in front of the company, among others.

Satisfied or dissatisfied customers contribute a lot to the future of each business/company. According to (Kotler, 2000), research reports that consumer dissatisfaction is often reported negatively with family and friends, broadly with other people. On the other hand, customer satisfaction is also disseminated in a positive way, but in a smaller number of people.

Based on this, it can be seen that dissatisfied customers can cause a lot of damage to a company, as factors that evidently influence the result of customer satisfaction.

Graph 01 - Ishikawa diagram



Source: Lima and Pereira, 2023.

In this way, it was found that the company needs to invest in this item, as well as in training programs, as the negative aspects and to improve lead to the main problem, which is failures in customer service. The proposal to optimize the strategic marketing planning process in the company Ntc, aims to present the result with technical analyses aimed at good management within the organization.

Graph 02 - Ishikawa diagram

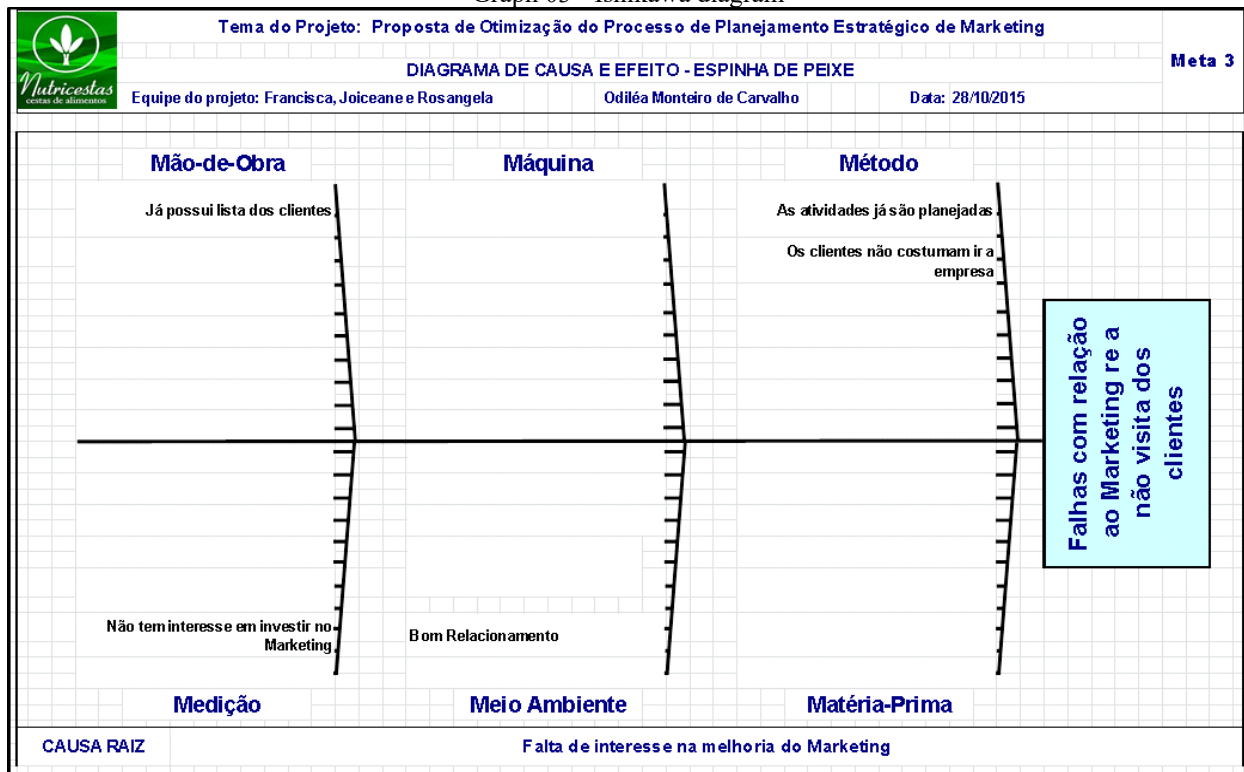


Source: Lima and Pereira, 2023.

In the Gráf. 02 shows that the training carried out in the company is of great importance for employees to be able to make decisions within their function and propose improvements. At the Ntc company, for some time training was provided for employees, but it was not continued, which does not contribute much to the performance of employees.

Thus, (Chiavenato and Marras, 2000) contribute to affirming that training and practice prepare the employee for routine processes and tasks, in order to prepare the company for long-term growth in the market.

Graph 03 - Ishikawa diagram



Source: Lima and Pereira, 2023

According to Gráf. 3, it was observed that the company has a good interpersonal relationship between manager and employees, this contributes to a good performance in the activities to be performed, since to solve some existing problems in a company or organization it is necessary to define the objectives to be achieved, through decisions involving both internal and external relationship processes, vertical integration, adopting a flexible policy in the use of resources, discussing and analyzing the service strategies adopted.

According to (Kotler, 1998) in order to understand the company's relationship marketing with customers, it is necessary to initially identify the processes involved in this chain so that over time this attraction is more lasting.

CONCLUSION AND RECOMMENDATIONS

In this academic article it can be concluded that strategic marketing planning is of interest to the whole society, and not only companies or even students in administration. The study aimed to diagnose the current situation of the Ntc company and create an action plan that predicts possible problems, through scientific studies and methodologies used, such as direct observation, questionnaires and interviews.

The organization is currently considered a micro company that sells basic and Christmas baskets and has as its main vision the fulfillment and satisfaction of consumers in general. For this



reason, it was recommended that the company continue to invest in people who are able to perform functions that require operational and daily tasks according to each position.

The success of the Organization depends only on good strategic planning and the same depends on the people at the hierarchical levels, who seek continuous improvement. With this, there will be a range of information to be offered to the company, creating clear and effective strategies to solve the problem.

Based on the organizational diagnosis, a problem was identified in the company, in which the marketing item does not have an evident performance, leaving something to be desired in important aspects. Therefore, it was found the importance of improving the way the organization identifies and manages activities aimed at knowing the needs of its consumers, with the main objective of customer loyalty, leading the company to achieve the planned goals and reach new market levels.

In view of this information, it is important to highlight the potential of the company, which despite the competition in the market has a great differential and its services. Based on the content studied by this company, we had to elaborate a range of suggestions for improvement that will be available to the owner partner to put into practice the proposed actions and solutions.

In view of this, the researchers recommend that the best path to follow to carry out a research with the topic addressed is to opt for companies that already have a marketing plan and search other sources for content, such as the media, websites, since the subject is in evidence in these media, so that in this way it can facilitate understanding and stimulate the dissemination of the theme.



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