

**Evolution and Trends in the Study of Marketing Planning**

**Track: Management Education and Teaching Cases**

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### **Abstract**

This essay discusses the evolution of marketing planning. The origins of marketing were researched, including the insertion of the subject into the university curriculum, in an attempt to understand its trajectory to its current stage. The study was carried out from the bibliographical survey that approaches: (i) the evolution of concepts; (ii) the first courses; and (iii) the evolution of marketing planning. It is concluded that, despite the importance of the subject and of its use in practice, is still poorly approached in academy and it is necessary to update it to cope with major transformations in society and companies.

### **Introduction**

The understanding of the current situation and the establishment of trends are facilitated by the study and the comprehension of the past. Marketing, in relation to other sciences, is significantly recent; it only started being formally studied at the end of the 19<sup>th</sup> century.

It is undeniable that this fact facilitates to recover its history. However, it is observed that only some fields of the subject had considerable attention by authors and researchers, who published a large volume of articles and books. The marketing planning, for example, despite being a common practice in organizations, is an issue poorly approached in academic researches.

Therefore, this study sought to recover the evolution of marketing as an organizational practice, field of study and subject in universities, in order to understand the evolution and trends in marketing planning. The study was developed on the basis of a bibliographical survey on the evolution of concepts of marketing, marketing courses and, in particular, marketing planning.

### **Evolution of concepts of marketing**

Marketing practices date back from the economic development of societies, but the theory of marketing only emerged in the 20<sup>th</sup> century (Alderson, 1958; Bartels, 1974, 1976).

In addition to a philosophy of administrative action, marketing is also a structured body of knowledge and a set of management techniques and instruments directed toward facilitating and improving exchanges of goods and services between offerors and receivers. For this reason and for the fact of it being a subject influenced by many other fields of study (sociology, psychology, social psychology, statistics, among others), even having more than one century of discussions,

advances and development of theory, concepts and models, marketing still has several conceptual gaps, doubts and controversial matters.

According to Ajzentel (2010), the term 'marketing' had its first scientific record in 1902, in the United States, and the first Marketing course, offered by the Wharton School, appeared in 1904. Entitled 'The Marketing of Products', it emphasized advertising, and there was no idea of a new field of study yet.

Fullbrook (1940), Converse (1945) and Copeland (1958) point out that the functional concept of Marketing was originally conceived by Arch Shaw, one of the pioneers in Marketing literature. According to the authors, it all started with a suggestion of the dean at Harvard University, at that time, professor Edwin F. Gay. Shaw wrote an article published in the *Quarterly Journal of Economics*, in August 1912, which was republished three years later, with an introductory chapter entitled 'Some Problems in Market Distribution'. Marketing was introduced as a study of the process through which goods reached their end consumer, in relation to the distribution of products.

As emphasized by Fullbrook (1940), it occurred three years before what Converse (1936) considered a 'pioneering period' in marketing literature: from 1915 to 1917. Authors and published works, such as those of Weld (1917), Cherington (1920), Vanderblue (1921) and Macklin (1922), were also considered important among those contributing to the first ideas of approach to functional marketing. Another article to be highlighted was published in 1914 and written by Charles Parlin. Despite being less mentioned by the literature, 'Why and how a manufacturer should make trade investigations' represents one of the first articles of the Commodity School, which strictly focused on the object transacted, and not on the relations and transactions themselves.

Still deeply influenced by the economic theory, Marketing Schools at that time did not consider human behavior as a relevant variable to the study of marketing. The dominating premise was that people behave rationally to maximize the economic utility. Any behavior failing to maximize the utility was considered an error (Blair & Uhl, 1976).

In this context, three schools are worthy of mention: i. the Commodity School, which focused on the object transacted and on how it determined market relations; ii. the Regional School, which directed its studies to distribution channels and which believed that markets were organized from the location of transactions; iii. the Functionalist School, with emphasis on Shaw, which affirmed that some functions should be performed in any marketing process and that such functions would determine the market organization.

In 1943, Converse (1945) conducted a research among the principal marketing pioneers. They were required to list the most important contributions to the development of marketing as a field of study. The most voted concept was the concept of marketing functions of Shaw (1915), according to which the term 'functions' referred to acts and services

performed by intermediaries. Shaw identified five intermediary's functions: (i) sharing of risks; (ii) transport of goods; (iii) funding of operations; (iv) sales of goods; (v) assembly, classification and transfer. (Jones & Monieson, 1990).

According to Converse (1945), the concept was rearranged, reclassified and clarified by L. D. H. Weld in 1917, and numerous addenda and changes were subsequently made by Macklin, Vanderblue, Horner, Maynard-Weidler-Beckman, Ryan, Jones and by himself.

The study of Arch Shaw was considered by Copeland (1958) as one of the most noticeable studies of marketing. In this article, the author classified distribution activities as those of creation of demand and physical supply. Shaw, then, continued to discuss several theoretical and operational aspects of these activities, reinforcing their interdependence.

Although some books of sales and advertising had been published before 1912, these books did not present scientific relevance and were not directed toward marketing students. Thus, such article provided the first broad discussion on marketing functions, which was remarkable for the beginning of a systematic literature in this field (Copeland, 1958). At that time, marketing and distribution were used as synonyms by the first authors (Converse, 1936; Maynard, Weidler & Beckman, 1927) and received too much attention, once some authors, such as Hepner (1955, p. 1), affirmed that 'number-one problem of the current economy is distribution' or that marketing is movement (Shaw, 1915).

Marketing researches, practices and studies have always walked together; thus, marketing courses have been very important to the development of the activity. Hagerty (1936) reported that, in 1905, he offered a three-hour course in Ohio State University in product distribution and emphasized how teaching an issue without literature was difficult. To solve this problem, he was supported by merchants of the city of Columbus, who came to the university to talk about marketing problems that were familiar to them. In the subsequent years, the course expanded to other names and duration, and, in 1916, it became Marketing.

Concerns about advertising, retail, research and price were common in the first decades of the 20<sup>th</sup> century, as shown by the articles published. In the first 10 years of publication of the *Journal of Marketing*, the most discussed issues were marketing research (34.1%), government laws to regulate marketing (16.7%) and retail (7.4%). It is interesting to emphasize that, at that time, the majority of contributions originated from business persons (170 articles) and non-academic persons (146 articles) (Applebaum, 1947).

For this reason, in order to standardize terminology, organize concepts, ideas and techniques and encourage advancement of the subject, a group of specialists founded, in 1931, the American Marketing Society, which started publishing the *American Marketing Journal* in 1934 (Ajzentel, 2010).

At that moment, marketing was already comprised of a set of techniques and activities related to marketing, distribution, advertising and sales of agricultural and industrial goods.

However, marketing has only gained space and consistency from the end of the 1950's and the beginning of the 1960's. From 1956 to 1961, the period in which the American Marketing Association's, *Journal of Marketing*, published a series of short bibliographical profiles entitled 'Pioneers in Marketing'. Next, it published 'Leaders in Marketing' between the years 1960 and 1970. In this period, between 1950 and 1960, Wroe Alderson was elected as a leader in the field by marketing theorists (BLAIR; UHL, 1976). The main exponent of the Functionalist School, Alderson made several contributions to the subject, such as the proposal for a general theory of marketing, the discussion about the concept of transaction and the creation of the concept of transvection (Alderson & Martin, 1965), for example.

After World War II, the analytical model of the marketing mix, subsequently known as the 4 P's, became popular. The mnemonic artifice was popularized by McCarthy (1960) from classifications presented by theorists of the Functionalist School, such as Shaw, Weld, Ryan and McGarry (Ajzentel, 2010), with special attention to the proposition of Neil H. Borden, in his discourse at AMA in 1953 (Borden, 1964).

Subsequently, the classic debate between Kotler and Levy (1969a), Kotler and Levy (1969b), Luck (1969) and the study of Kotler (1972) with respect to the concept of marketing brought to light the importance of the concern about society and excesses generated by consumerism. This concern has been reinforced in the last years with a significant emphasis on social accountability and sustainability.

### **Identity crisis and problems in defining marketing**

Many years ago, one of the main professors at an important Brazilian university, already deceased, attending an examining board for Master and Doctor's degrees in marketing commented: "There is an identity crisis in marketing. After many years attending examining boards, every marketing thesis that I read still starts with the definition of Marketing". Bartels (1974) had been discussing this crises for almost four decades, and it seems that it has not been solved yet. The definition found in books and in one of the principal marketing associations, AMA, is changed periodically.

Rewoldt, Scott and Martin (1973, p. 3) remembered by Hunt (1976) said that "marketing is not easy to define. Nobody has still been capable of formulating a clear and concise definition universally accepted". Brown (2001, p. 93) suggests that one of the reasons that motivated the identity crisis in marketing, as well as the discussion about art versus science, is the apparent lack of ability of marketing professionals to agree on the domain of study of the subject.

The most recent definition of AMA (2013), which still receives many criticisms and which will probably have changes, is: "Marketing is the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large."

Kotler and Keller (2012), in their most recent work, the 14<sup>th</sup> edition of ‘Marketing Management’, the book most used in universities worldwide, present some different definitions: “Marketing has to do with identifying and understanding human and social needs”, or, even, in sum, “marketing means to meet needs profitably”, “marketing management is the art and science of choosing target markets and of obtaining, retaining and increasing the number of consumers through the creation, delivery and communication of superior value to consumers” (p. 5). They also emphasize that the definition of marketing can be broken down into a social and a managerial one. The social definition is related to the role of marketing in society, with concerns about the environment and standard of life, for example. The managerial definition, in turn, relates to the concern about sales.

As commented, in the beginning, marketing was seen as a synonym for distribution. It gradually became an extension of sales and later comprised advertising in the industry of consumer goods. As the majority of managers were salespersons or advertisers, the prevailing tools were related to communication and advertising. Marketing was seen as an art requiring from its practitioners a mix of creativity, intuition and inspiration (Bowen, 2002).

Despite the lack of consensus in literature, our proposition is that marketing should focus on the management of exchanges, and its management should develop activities to effectively satisfy, as best as possible, the parties interacting in the exchanges.

In Brazil, marketing – its activities and its meaning – is subject to confusion and inappropriate interpretations. To begin with the term, which remained as the original term in English, due to its difficult translation. Especially because of the ‘ing’ suffix, which is not a gerund, but a noun denoting action.

In the past, there were attempts to translate Marketing into *Mercadologia* – as it was once registered at the Ministry of Education. However, ‘logia’ means study, which would restrict the definition of Marketing to the ‘study of the market’, not capturing the core of the meaning (the study of market only represents a fraction of marketing activities). A reverse translation proves the error of reasoning: *Mercadologia* would be *Marketology*, and not Marketing. Many years ago, Professor Raimar Richers at Fundação Getulio Vargas de São Paulo (Getulio Vargas Foundation of São Paulo) also presented studies and articles on the term ‘*mercadização*’, which did not become popular. In the end, the term that prevailed in Brazil and worldwide was Marketing. As commented by Richers (1994), despite the efforts to translate ‘Marketing’ into Portuguese, the “name remained the same: simply Marketing”. (p. 30)

Marketing is usually confused as a synonym for sales and/or advertising, communication activities. It is explained by the fact that, in Brazil, the marketing professional was restricted to these activities, once many products were imported or based on the production of the parent company. The marketing manager had little to do with respect to the product, its price and distribution, but he/she made several decisions on communication. Additionally, advertising in Brazil has always been

creative and good in quality, holding a certain fascination and generating communication by word of mouth, which reinforced this idea. In addition to these matters, mass media constantly helps disseminating wrong concepts of marketing.

The last source of confusion we bring to light is the multidisciplinary and interdisciplinary approach of the activity. Wind (2009) emphasizes that the first thoughts of Peter Drucker already pointed out this characteristic. During the 1950's, Drucker defined the purpose of a business as that of "creating customers"; however, it took many years before companies adopted this central view of the consumer. He also affirmed that marketing was very important to be left only for marketing professionals, as marketing encloses the whole business. It is the business seen from the point of view of its final result, that is, from the consumer's point of view. Thus, the concern and responsibility related to marketing should permeate all areas the company (Drucker, 1954). Marketing should become an orientation for businesses, that is, an organizational philosophy. Kotler and Levy (1969a) also vigorously proposed the expansion of the concept of Marketing beyond business companies. McKenna (1991) also approached this issue. In his article, the author affirmed that Marketing is everything and everything is Marketing. However it gave margin to many different interpretations, resulting, sometimes, in not only very positive aspects, but also distorted views of what Marketing activities are.

Nowadays, the specific marketing literature is comprehensive and was duly regulated, organized and structured by the compilation work performed for more than three decades by Kotler (Cunningham, 2003). Although many in Brazil feel sorry about the text, which is far from the local reality, the adoption of the book is almost unanimous in schools, and perhaps its significantly strong presence in the country is a barrier for the production of a book of national marketing. It is noted, however, that the translation of the book advanced significantly in terms of approximating its content to the Brazilian context, offering several footnotes, cases and national examples, seeking an effective adjustment to the reality of Brazilian readers.

In 2003, Wilkie and Moore proposed an organization of the Eras of Marketing (Table 1). Despite the criticism experienced (Holbrook, 2005; McAlister, 2005; Gaski, 2007), the authors' study is useful, as it lays the foundation for reflections.

**Table 1 – Eras in the Evolution of Marketing**

<b>Stage</b>	<b>Period of time</b>	<b>Main characteristics</b>
Pre-marketing	Before 1900	No field of study; matters were treated in the field of Economics
Era I – "Founding the Field"	1900 – 1920	Development of first the courses with 'Marketing' in the title; emphasis on defining the scope of marketing activities, such as economic institution; focus on Marketing as distribution.
Era II –	1920 – 1950	Development of generally accepted foundations or 'principles of

“Formalizing the Field”		Marketing’; establishment of knowledge development infrastructure for the field: professional association (AMA), conferences, magazines ( <i>Journal of Retailing, JM</i> ).
Era III – “A paradigm shift – marketing, management and sciences”	1950 – 1980	Growth boom in the U.S. consumer market and in the body of concepts of Marketing; two perspectives domain the trends in Marketing: (1) the managerial point of view and (2) the behavioral and quantitative sciences as keys to the future development of knowledge, the infrastructure of which undergoes major expansion and evolution.
Era IV – “The shift intensifies – A fragmentation of trends”	1980 – present	New challenges appear in the business world: short-term financial focus, downsizing, globalization and reengineering; dominant perspectives are questioned at debates on philosophy of science.

Source: Based on Wilkie and Moore, 2003

### The first Marketing courses

Professor Dr. J. E. Hagerty at the Ohio State University reports the history of the first Marketing courses in the United States (Hagerty, 1936). According to him, before 1900, there were 3 Business Administration Schools (Wharton School of the Pennsylvania University, organized in 1881, and the California and Chicago Universities, organized in 1898). After 1900, other schools started having Management courses with more specific fields. Hagerty himself started studying what he understood as Marketing in 1899 in a course entitled ‘Distribution of Industrial Products’. He narrates his own experience when introducing a course in distribution of products in the Ohio State University, in 1905, which, in 1916, became Marketing.

For Weld (1941), the first course linked to the field of Marketing was offered by the University of Michigan in 1902. Hagerty (1936), in turn, alleges that the first Marketing course was also given in 1902, however, in the University of Illinois. After many debates and disputes between both of them, Maynard (1942) ends up affirming that the University of Michigan in fact came first. In 1950, Simon writes an article referring to the studies of Weld (1941) and Maynard (1942) “to correct an omission about the pioneering teaching of marketing in U.S. universities”.

The author argues that “previous investigations obviously did not reach the Pacific Coast, where, in the same year, marketing courses started being offered” (p. 220). Simon continues arguing that authors preceding him did not pay attention to the fact that a similar study had been developed by professor G. M. Fisk in the University of Illinois and that, in 1902-

1903, in the California University, in a new department of economics, with professor A. C. Miller acting as the head, two new professors had been hired, Professor Wesley C. Mitchell and himself, to teach in a course entitled 'Techniques of Trade and Commerce'.

This dispute is natural, as no course given so far had been entitled 'Marketing', which, according to Weld (1941), only appeared in 1904, in the Pennsylvania University. At that time, the most common titles of university courses were 'Commerce and Trade' and 'Distribution of Industrial Products' (Weld, 1941; Hagerty, 1936). As already mentioned, one of the main difficulties found at that time was the fact that there was no literature available. Even specific publications paid little attention to the Marketing theme. "Only when the sales or the situation of marketing in the market became a problem, a space was provided in these publications for the marketing issue" (Hagerty, 1936, p. 23).

An example of it was the Antitrust Sherman Act, enacted in 1898 and effectively applied from 1904. The Act imposed to the State a more substantial control over companies' activities, encouraging free competition and causing them to treat the sales of their products more professionally. According to Hagerty (1936), the release of three books contributed to a great advance in the teaching of the subject: *Advertising as a Business Force*, by Paul T. Cherington (1913), *Marketing of Farm Products*, by L. D. H. Weld (1915) and *An Approach to Business Problems*, by Arch W. Shaw (1916).

According to a research conducted by Hardy (1955), it can be observed that between the years 1930 and 1950, while the number of colleges and universities increased by 39.8%, the number of institutions offering marketing courses increased by 130.1%, and 688, out of 971, offered marketing. In this period, specialized courses approached advertising, sales management, retail, marketing research and public relations. Planning courses appeared only afterward.

### **Marketing planning: recovering the past**

Despite marketing planning being a core component of marketing management (Whalen & Holloway, 2012), researches in the field have never been prodigal. For this reason, the literature about Marketing Planning and particularly that concerning the Marketing Plan remains scarce until today.

Stasch and Lanktree (1980) once wrote that "for the fact that the annual marketing plan is so important, a vast research on the topic was expected to occur, but it was not the case" (p. 79). The first studies published in the *Journal of Marketing* generically referred to planning, and not specifically to Marketing Planning. For example, Hart, in 1940, in his book entitled 'Anticipations, uncertainty and dynamic planning', suggested contributions to several marketing activities, including to the marketing plan. One of the first mentions of marketing planning was made by Bice (1942). In his article, the author emphasized the importance of preparing long-term action plans, as well as the exercise of making judgments based not only on experience, but also on the analysis of facts.

In April 1943, the *Journal of Marketing* published an edition with 4 articles referring to post-war planning, by Cunningham (1943), Alderson (1943), Livingston (1943) and Hovde (1943). In other editions, some other articles were published, such as those written by Hoffman (1943, 1944), Rush (1943) and Ormsby (1943). These studies emphasized the implications of marketing for planning at national, industrial, organizational and general community levels. Macy (1945) made suggestions for the forecast for army materials based on field research. In the second half of the 1940's, the first specific studies on marketing planning began to appear, such as that of Trickett (1946), which approached the planning and control of production and sales and which emphasized the importance of marketing research to lay the foundation for planning and control. Other contemporary authors to Trickett proposed another approach to the topic: Comish (1947) related problems in planning stock for small-sized companies; Phelps (1947) recognized that marketing planning was an integral part of a sales manager; Parnes (1948), in turn, studied the planning of department stores.

When analyzing six decades of the *Journal of Marketing*, Kerin (1996) found that in the decade of 1946-1955 the magazine clearly focused on marketing as an administrative / managerial activity. Marketing functions were seen as activities to be planned, organized, structured, directed and controlled.

Marketing management gained recognition at the beginning of the 1950's, when General Electric and other U.S. corporations adopted the concept of marketing and transformed it into the milestone of the company's philosophy. This phenomenon occurred mostly among large consumer goods corporations (Raymond & Barksdale, 1989). In the subsequent years, the specific literature of marketing planning became scarcer again – with special attention, among others, the studies of Buell (1956), which emphasized the importance of organizational structure, of Wolesson (1965), which mentioned the planning, but with emphasis on the promotion in the agricultural product industry, and those of King and Cleland (1974), which presented the external information system to support the strategic marketing planning.

The article of Stasch and Lanktree (1980) presents 4 fields of research related to marketing planning. The first category refers to annual marketing plans, and the study of Hopkins (1972), outlining the formats of marketing plans used by different companies, is mentioned. However, the study does not present references to the process (who, how they participated or what procedure they used). The second category includes books that do not present empirical foundations and that refer to general topics, such as principles of marketing planning, guides, use of models, among others, such as the studies of Stern (1966), Kelley (1972), Stasch (1972), Ennis (1973) and Stapleton (1974). The third category, based on the empirical research, focuses on the individual responsibility instead of on the marketing plan or on the procedures used to develop it. The texts offer references to product and brand managers and are based on studies that identify what they did, the level of development in several decisions, recommendations and individuals for contact. Similarly to the first category researches, the studies of this last group did not identify the participants in the marketing planning process or the procedures

used when the annual marketing plan was developed. The studies of Luck and Novak (1965), Luck (1967), Payne (1971), Gemmill and Wilemon (1972), Lucas (1972), Buell (1975), Clewett and Stasch (1975) and Hise and Kelly (1978) fit in this category. The fourth category contains empirical articles that do not fit in other categories, but that are relevant to the issue. This category includes the studies of Feder (1965) regarding the allocation of marketing fund among different markets, of Sevin (1965) with respect to the productivity and analysis of the cost of distribution, of Banks (1973) involving trends in changes that affected advertising and promotion, of San Augustine and Foley (1975) concerning how the budget for advertising is established, and of Strang (1975) regarding the relationship between advertising and promotion. Table 2 summarizes these aspects.

**Table 2 – Four categories of fields of research for marketing planning organized by Stasch and Lanktree (years 1960-70)**

<b>Focus</b>	<b>Content</b>	<b>Principal Author(s)</b>
Annual Plan	Forms and patterns of annual marketing plans.	Hopkins (1972)
General topics without empirical groundwork	Concepts about principles of marketing planning, guides and use of models. Responsibilities, procedures.	Stern (1966), Kelley (1972), Stasch (1972), Ennis (1973) and Stapleton (1974)
Empirical research	Studies identifying the work of the product and brand manager (type of decisions, level of involvement, relations).	Luck e Novak (1965), Luck (1967), Payne (1971), Gemmill and Wilemon (1972), Lucas (1972), Buell (1975), Clewett and Stasch (1975) and Hise and Kelly (1978).
Several other empirical studies	Allocation of marketing funds among different markets; Productivity and distribution cost analysis; Trends and influences in advertising and promotion; Establishment of budget for advertising.	Feder (1965); Sevin (1965); Banks (1973); San Augustine and Foley (1975); Strang (1975).

Source: Adaptation from Stasch and Lanktree (1980)

Table 2 sets forth the organization and the primary researches from 1960 to 1970. Table 3, in turn, as previously presented, covers a longer period.

After the period analyzed by Stasch and Lanktree (1980), other studies are worthy of attention. Hulbert, Brandt and Richers (1980) described and compared the practices of Japanese, European and U.S. multinational subsidiaries operating in Brazil, discussed some common problems and ways to solve them. Sheth and Frazier (1983) proposed a planning model to manage marketing controllable variables, aiming at the profit margin and the return on investments. Although not specifically referring to marketing, the thought of Mintzberg (1994), criticizing the formal planning, exerting significant influence on the field.

Primarily in the years 1960 to 1980, many analysis tools, such as the market-product growth strategies of Igor Ansoff, of 1957 – first with his paper, and later, in 1965, with his book. Other analysis tools also appeared in this period, such as the experience curve and portfolio analysis. The product lifecycle appeared between the decades of 1950 and 1960, and others, such as SWOT (Andrews, 1971), between the 1960's and the 1970's. The SBUs (Strategic Business Unit), BCG (Boston Consulting Group), GE Parent Company (Market attractiveness and power), PIMS (Profit Impact of Market Strategies) appeared between 1970 and 1980. It is worth remembering the five competitive strengths and the generic competition strategies (Porter, 1985), the essential competencies (Prahalad & Hamel, 1990) and the Balanced Scorecard of Kaplan and Norton (1990's and beginning of the 2000's).

In the 1990's, Europeans, specifically researchers from United Kingdom, were more effective in researches of marketing planning, as proven by the studies of Cousins (1991), Simkin (1996a), Simkin (1996b), MacDonald (1992), Piercy (1995), Piercy and Morgan (1994), Leeftang and Mortanges (1996) and Harris (1996). Such researches emphasized the behavioral aspect. During this decade, the North American researchers, McGrath and MacMillan (1995) warned against the risk of the planning based on assumptions.

Subsequently, the studies of Moormam and Miner (1998) and of Slotegraaf and Dickson (2004) aimed at the improvisations and the effects on marketing management. The research of Cooper (2000), in turn, outlined a marketing planning proposal for radically new and innovative products that affect the consumer's traditional way of decision. More recently, the article of Whalen and Holloway (2012) suggests a change from traditional planning to a more active posture, in order to meet new ventures.

Despite its importance, the existence of several courses in schools and universities and the practical use of models and tools related to marketing planning, research and literature concerning this specific theme remain scarce. The most important international didactic books are those of McDonald (2007), Wood (2011), Cohen (2006), Chernev (2011) and Sorger (2011). In Brazil, those of Campomar and Ikeda (2006) and Neves (2005) are also worthy of mention.

Without intending to propose a division of the evolution of researches on planning, but only to organize and facilitate its understanding, Table 3 sets forth some of the main researches on the theme.

**Table 3 – Evolution of the research marketing planning over time**

<b>Period</b>	<b>Central approach</b>	<b>Main authors</b>
Years 1940-1945	Postwar planning and implications of marketing for strategic levels.	Cunningham (1943); Alderson (1943); Livingston (1943) and Hovde (1943); Hoffman (1943; 1944); Rush (1943) and Ormsby (1943); Macy (1945).
1945-55 (Postwar Period)	Specific researches on planning of (research, production, sales and stock) activities. Planning as an integral part of the administrative process.	Trickett (1946); Comish (1947); Phelps (1947); Parnes (1948);
Years 60-80	Formats and models of plans, guides, importance of information. Tools for analysis. Empirical studies.	Woleson (1965); King and Cleland. (1974); Hopkins (1972); Stern (1966), Kelley (1972), Stasch (1972), Ennis (1973) and Stapleton (1974); Luck and Novak (1965), Luck (1967), Payne (1971), Gemmill and Wilemon (1972), Lucas (1972), Buell (1975), Clewett and Stasch (1975) and Hise and Kelly (1978); Feder (1965); Sevin (1965); Banks (1973); San Augustine and Foley (1975); Strang (1975).
Years 90-2000	Predominance of studies conducted by researchers from the United Kingdom. Cultural and behavioral aspects.	Cousins (1991); Simkin (1996), MacDonald (1992); Piercy (1995); Piercy and Morgan (1994); Leeflanf and Mortanges (1996), and Harris (1996) x.
21 <sup>st</sup> Century	New paradigms, challenges and innovations.	Slotegraaf and Dickson (2004); Cooper (2000); Whalen and Holloway (2012)

Source: Developed by the authors.

This brief report and recovery of the past of marketing and marketing planning intends to clarify, explain and better understand the current situation of the subject. The set of researches and studies presented certainly contributed to expand

knowledge in the field. However, there is no special attention paid to any related works, which individually has not caused significant impacts.

### **Final reflections and considerations**

The first discussions and ideas about marketing appeared at the end of the 19<sup>th</sup> century and beginning of the 20<sup>th</sup> century, but they only flourished after World War II. The origin of the majority of the studies documented in the field is Anglo-Saxon, in particular North American.

In Brazil, the first management course was offered by the Higher School of Business Administration - ESAN in São Paulo, in 1941. The School of Economics and Administration of the University of São Paulo - FEA/USP was founded five years later, in 1946, followed by the Brazilian School of Public and Business Administration of Getulio Vargas Foundation EBAPE/FGV, in 1952, in Rio de Janeiro (CFA, 2013). Therefore, it is verified that the history of marketing as an academic subject is relatively short and recent. This fact have caused Brazilian students and professors to strongly experience a foreign influence. The reason is very simple: the volume of international books and articles covering all sub-subjects of marketing is huge and considerably deep. Although there have already been publications of national authors, the majority remains under the inspiration of foreign works, so that the material used in schools has been predominantly composed of translations of international authors.

As in the past, still today text books put more emphasis on strategic planning than on the annual plan. Strategic planning is treated generically (especially its steps); the discussion basically occurs about the components of the plan (segmentation and positioning, target markets, competition and promotion). There is a little discussion about who develops the plans or how these plans are carried out. In general, mentions are made about the top-down, bottom-up and goals-down-plans-up approaches, with a few discussion about the planning process (Stasch & Lanktree, 1980) and its relation and/or implications in the development of organizations.

It is noticed that the way marketing planning and, particularly, the marketing plan are taught requires urgent adjustments, also with respect to their importance: to the creation of new and effective tools for the analysis of increasingly fast changes in turbulent environments; to the development and use of quicker models and instruments, such as the new technologies (Internet, communication and software); to the broadening of marketing executives' knowledge of consumer behavior, social and environmental problems and impacts of globalization, so that organization can quickly and easily adjust themselves to the evolution of the environment.

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