Trust-based marketing leadership: What senior leaders should be focusing on during brand plan reviews

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Abstract

Virtually every marketing team, in every company and in every industry, goes through the yearly, if not more frequent, ritual of developing and presenting its business/marketing plans to its executive team. This process can involve considerable time and expenditure. In very many cases, executives' own blind spots of their role in the process can have a host of negative consequences for the quality of the plans themselves and, just as importantly, for the motivation and engagement of the team. When leaders second-guess the work done by expert and dedicated teams or use the ritual as an opportunity to micromanage or grandstand, there can be many consequences, some of which are outlined in this paper. This paper discusses ways to make it right, and offers a number of tips for leaders to consider as they manage and conduct brand strategy and plan reviews. The current author believes that embracing some or all of these tips will result in not only better plans, but also more engaged and motivated teams.

Keywords

brand plan, strategic plan, marketing plan, engagement, culture, motivation, plan review

INTRODUCTION

Virtually every marketing team, in every company and in every industry, goes through the yearly, if not more frequent, ritual of developing and presenting its business/marketing plans to its executive team. The composition of these executive teams varies but typically involves one or more of the following personnel: Chief Marketing Officer, Chief Commercial Officer, Business Unit Head, Chief Strategy Officer, Regional VPs and the like.

The purpose and value of this process cannot be underestimated as it helps determine brand direction, get senior leadership buy-in, prioritise resources, align the organisation and set clear expectations.

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It is a process that can entail considerable time and expenditure and can be quite complex and laborious, often lasting months and involving many people inside and outside the organisation.

After all this work is done, however, it can be thrown out of the window in a flash by blind spots affecting the fine line that senior leaders walk between leading and micromanaging or grandstanding. Michael Mankins and Richard Steele,[1] in their published research, identify several points of failure in the strategic process, including the timing and structure of the process as obstacles to good decision-making. The annual timing and single business unit (or brand) focus forces an unproductive 'dog and pony' show that makes it difficult to provide thoughtful strategic direction.

This is epitomised by a quote attributed to Tommy Lasorda, the legendary manager of the Los Angeles Dodgers, who said,

> I believe that managing is like holding a dove in your hand. If you hold it too tightly, you kill it. But if you hold it too loosely, you lose it.

If senior leaders have hired the right people and have provided the right vision, inspiration, direction and support, then they should let them do the jobs they were hired to do.

In this paper, we describe the consequences of senior leaders overplaying their roles and a few ways to make it right.

CONSEQUENCES OF LEADERS OVERPLAYING THEIR ROLES

Over the years, conversations with marketing professionals across industries have confirmed my own observations that many executives, though certainly not all, have a tendency to want to act as brand managers and often second-guess the team's thoughtfully developed strategies and plans. Self-awareness among leaders is often lacking; in fact, 80 per cent of people think they are better-than-average leaders.[2] This is a blind spot that is fraught with significant consequences; here are a few:

1. **Wasted time and money**
   Marketing is all about the thoughtful reduction of choices and takes time and effort to do well. Obtaining customer insights is involved and takes resources; developing and testing concepts with agencies takes creativity, innovation and specialised skills; doing strategic and tactical planning requires countless hours from cross-functional teams. A single comment or decision that circumvents this work can throw away all the effort and money that got invested.
2. **Demoralised teams**
   There are few things more demoralising than when people's months of analysis, research, idea generation, creativity and feeling of accomplishment get dismissed with one or two quibbling comments from someone in a position of power. Talented brand professionals have quit for other companies after seeing that a wealth of collective experience and expertise in the team is ignored or questioned with little basis or opportunity for open dialogue. In fact, marketers lead all functions in terms of turnover across industries (17 per cent).[3] Early-in-career high-potential marketing professionals may end up second-guessing their choice of employer when they see the public dismissal of their experienced colleagues' work. Successful and respected leaders are thought partners and ask many questions, including tough ones, but are not engaged in a sport of second-guessing, hyper-criticism or grandstanding.

3. **May end up in the wrong place**
   Second-guessing and nitpicking by executives may sound authoritative and is likely based on a lot of their own past experience and expertise, but ignoring the thoughtful work by the teams may end up in poor uncontested choices that can put the brand in peril. This is more likely in company or country cultures where one does not question senior authority, no matter what. Consequences are often seen in a lack of consistency and coherence in plans or in plans that miss the mark altogether.
4. **Trust and accountability breakdown**
   When alternative decisions are made, with or without merit, the team is stuck with the accountability for the brand results. Micromanaging decisions goes against the need for authority and responsibility to go together.[4] This is a difficult road to travel when there is fundamental disagreement or disconnect between the beliefs and recommendations of the brand team and the new goals being pursued. Invariably, this also can lead to a breakdown in trust in leadership, with a likely loss of productivity or, even worse, create an environment of resentment.
5. **Overcomplicated plans and execution**
   Clarity and simplicity of plans have long been known as critical success factors in brand strategies.[5] Minutia feedback and direction from senior leaders, especially when several are in the room, tends to be incomplete, often contradictory to one another, and can result in overcomplicated plans that lack coherence and are difficult to execute. This is typified when tactical plans involve multichannel strategies, and the interconnectivity among channels breaks down because of one decision in one channel strategy.
6. **Lost line of sight**
   A tenet of good plans is a clear line of sight going from customer and market insights to strategic choices to plans to execution and all the way to metrics. When pieces of plans are overturned without going back to the fundamentals, such as testing whether insights still support the new decisions, then the plan loses its line of sight and breaks down.

SOME WAYS FOR MARKETING LEADERS TO MAKE IT RIGHT

Every company has different operating structures, designs, cultures and processes; however, there are a few leading practices that should apply to most. Considering even a few of the practices listed here can have a positive impact not only on the quality of plans and strategies, but also on the motivation, engagement and development of marketing professionals. One overarching assumption is, of course, that executives have hired the right people and have provided sufficient vision, inspiration and direction; if they have not, then the issues lie elsewhere outside the focus of this paper.

One overarching recommendation is, when reviewing plans, to step back and look at the forest rather than the trees and to curiously look for patterns, outlines, broad strokes, coherence, balance, completeness; in other words, first asking the question whether it all makes sense.

> Curiosity is table stakes for anyone hoping to succeed…what separates top CEOs from the rest is how much they question, probe, and then process what they are experiencing in order to look for insights and patterns.[6]

The brand plan presentation is not a PhD dissertation that needs defending.

Some organisations still make it look that way with all the right people assembled and heavy proceedings. Careers are often made or broken on a single business plan presentation. Looking for marketing teams to 'know their stuff' and think on their feet is a fair expectation; however, over-played challenges and public punishments can have the unintended consequence of shutting down discussion, creativity and engagement.

Here are 10 specific tips to focus on during plan reviews. Focusing on these practices will keep leaders at the right level and help avoid the foregoing consequences.

1. Continuous planning
   Brand planning is a long game. There is a lot to be said for continuous brand planning rather than a single once-a-year abrupt start and stop event; this way the whole organisation becomes embedded in the end-to-end process, and the deeper annual review does not become an opportunity to turn everything upside down. When plans are annual events, the focus tends to be on 'approve' instead of on 'review'. Leaders should look for planning continuity where the team constantly builds, enhances and evolves, and where it is constantly assessing its strategies and actions and can articulate what went well or did not and why. Furthermore, this continuous planning model ensures strategies and plans are more in sync with changing market threats and opportunities in this increasingly dynamic market environment.
2. Dissociate budget-setting from brand planning
   It is unfortunate that in many organisations the brand plan reviews are attached or simply incidental to budget reviews. Having continuous planning with separation of brand planning from budget cycles will result in better plans and better budgets. This gives executives more time to have a dialogue to understand the content and make better decisions. Of course, having relative resource investments dimensions vis-à-vis strategic imperatives should be part of the brand plan, but certainly not in the great accounting detail that is a feature — and becomes the focus — of some plans.
3. Signs of quality planning
   Look for signs of how well the team understands their business (market, customers, patients, dynamics, etc). Look for concepts and not just how well their templates are built. The better the team and individuals understand and can articulate their environments, the greater should be confidence in the quality of their plans.
4. A handle on business drivers
   Assess whether the team has a good handle on the brand performance and potential, including sources of business; strengths, weaknesses, opportunities and threats; competitors; and so forth. Have they articulated any rate-limiting steps, important success factors and major barriers? Do they know where their current business is coming from? Do they know where there is white space opportunity in the marketplace? How are they managing the complexity of their business? The better the grasp shown by the team, the greater the confidence in their work and recommendations.
5. Confidence in choices and priorities
   Is there adequate passion and inspiration in the plan? Ask the team what they have kept more or less the same and why, and where they have made

the biggest changes from the current plan and why. There is often a temptation to drop and replace strategies or initiatives introduced by previous teams; this may or may not be appropriate. The team should articulate these choices in clear and realistic ways and avoid change for its own sake.

6. 20/80 Rule
   Strategic planning is useless if it does not drive choices and decisions. Is the team focused on the right priorities with the highest leverage and with the right urgency? Are they being ruthless in discriminating among strategies and tactics and avoiding 'peanut butter strategies', where they spread resources widely but thinly? In these days of so much new data and many new channels available to marketers, there is a temptation to do too many things. This is exacerbated by agencies, vendors and large consulting groups going straight to senior leaders and teasing them with new shiny objects that they then want to graft into work done by the marketing teams. Looking for ruthless selection — and supporting the team's choices — is important.
7. Clarity and line of sight
   Is the story clear, and is there a clean line of sight from insights to strategies to plans to measurement? Are the strategy and execution members of the team in sync? Is there 'internal consistency' in the plan; does the plan hang together, or does the story break down somewhere, and, if it does, is it explainable, and is it something that the organisation can live with and manage. Deficiencies in this area often point to deeper issues around team disagreements, disjointed ways of working, ineffective decision-making or simply rushed work. Those reviewing plans should take a few steps back and see them as a whole of consistency and coherence.
8. Team dynamics
   One of the functions of a leader is to manage not only individuals but whole organisations and their ways of working. How people work together is as important as the individuals themselves. Executives should assess whether the team works well together and whether all members seem engaged. Is there diversity of thought on the team, and how is this diversity applied, encouraged and optimised? Are there quiet but thoughtful voices being heard? Are there all differences of opinion being considered? Are there cliques of team members shutting down others? A wide body of evidence is available that shows that diverse teams with healthy operating practices produce superior results.[7,8] One other item to observe, if possible, is the effective use of external partners, agencies, etc; these are expensive but incredibly valuable extensions of the internal team. How is the brand team working with them? How is their work managed and their output considered and integrated?
9. Optimism, stretch, realism and transparency
   Executives should assess whether the vision, goals and plans have the right amount of stretch and innovation yet are realistic and implementable. Marketing professionals know that careers can be made or broken by a single plan or presentation, so they tend to be under pressure to stretch the positive, minimise the negative and, overall, avoid giving bad news. Successful and respected leaders encourage and embrace transparency without fear of repercussion. When teams are comfortable painting the whole picture,

the results are better plans and professionally engaged employees.

10. The right way of doing business
    In every industry, regardless of the amount of regulation it operates under, doing business the right way is not only a necessity, but something good companies and leaders should want to do. Leaders always ought to be looking for ethical and compliant intent in all plans, actions and words and should put a stop, without any hesitation, to anything that appears illegal or unethical. Doing this not only protects the company, but also engenders trust from the organisation, which is an important engagement factor — people want to work in organisations that want to and do behave ethically.

Strategic and tactical brand planning is enormously valuable and important. It is difficult for leaders to navigate the fine line between leading and managing. Taking these 10 tips into consideration during brand plan reviews, leaders can realise multiple benefits, including better decisions and plans, increased trust and more engaged marketing professionals.

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