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Canadian Institute of Marketing ethics review

By Ron (Doc) Halliday, MBA, M.CInst.M., RPM., FCInst.M., CMC



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Before reviewing our CIM ethics statements and forwarding my team's thoughts to Council, I believe it is necessary to begin at the beginning and research what ethics are, from individual and organizational perspectives. This will include looking at the stated ethics of leading companies and organizations known for their ability to live according to, and govern their conduct in alignment with their ethics. We anticipate completing our research and forwarding suggestions by June, 2009. Should you wish to share input or provide an opinion, please send along an e-mail. My coordinates are at the end of this article.

When our research and study are complete, it is our goal to be able to answer the following questions. What constitutes ethical and unethical behaviour of CIM members, and how should we self-govern in adherence to our ethical stan-

dards? Are the existing standards adequate? Is the process in place for clients of CIM members to express themselves, positively or negatively, to the Institute? What is the process for handling both? What needs to change, if anything? I'm sure other questions will come to mind during the review process.

What are Ethics and why are they worth reviewing? Throughout the civilizations, people from philosophers to commoners have debated what ethics are, as well as how they affect our personal and professional lives. By today's definition, ethics is a study of right and wrong conduct (Rugierro, V, 1997). Scientifically, ethics can be placed into either a descriptive or philosophical realm. As a scientific discipline, ethical study collects data on what people in different cultures view as right or wrong. Philosophically, ethical debate addresses moral questions (normative ethics) and examines various ethical systems, their logical foundations and consistency (metaethics) (Rugierro, V, 1997). A dictionary definition of ethics is: "a study of the general nature of morals and of the specific moral choices to be made by a person" (Dictionary.com, 2003).

Ethics are theories that address Socrates' question of "how we ought to live" (Paul, J., Strbiak, C., 1997). As many people agree, ethics is essentially a study of what is right and what is wrong. Though ethics seems to be a simple concept, there are many views on what is ethical. For example, Immanuel

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Marketing Canada

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Ethics review

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Kant conceived of right action “as acting with right intention” (Paul, J., Strbiak, C., 1997).

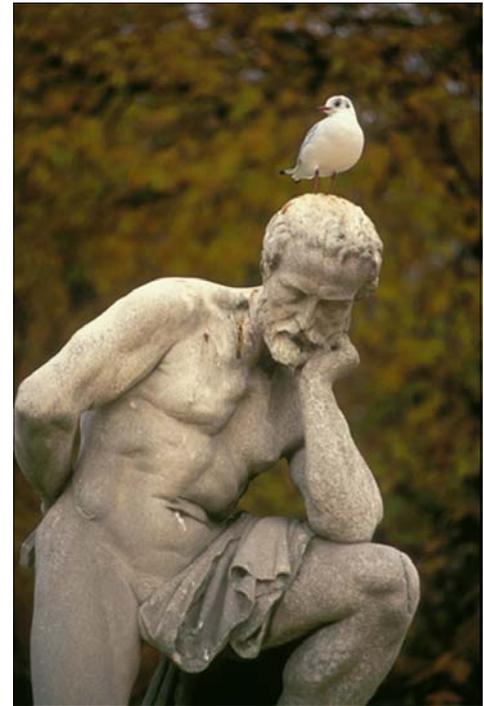
Others agree that ethical conduct is what rational people accept for their mutual benefit. In other words, if a reasonable group of people accepts a certain action as ethical, that action in fact is ethical.

Many philosophers believe that there is no such thing as universal and moral truth, but rather a set of cultural values instilled in an individual by a given society. Furthermore, a theory called ethical egoism “is based on the view that people ought to do what is in their self-interest” (Paul, J., Strbiak, C., 1997). Though it is apparent that the question of ethics is a complicated one, ethics and ethical behaviour (or communication) has to eventually be applied.

In today’s business climate, a discussion of ethics is as relevant as ever. The topic seems to be on the front page of just about every magazine, since current business scandals started with Enron and continued with a number of businesses including WorldCom, Arthur Anderson and others, and now Wall Street. While some of these scandals revealed illegal behaviour, some simply showed how unethical today’s business climate can be.

Professional organizations such as ours must act in an ethical manner. We must trust and respect our members while ensuring we provide an ethical framework for conduct that guides our members actions, doing what is considered right as marketing professionals.

It is my hope that we can move from generic ethical statements to more specifically address our conduct, ethical versus unethical, as marketing and communication professionals. We need to agree that as members we are responsible for the CIM’s ethical standing in Canada.



If a registered marketing professional participates in, or condones a client’s unethical marketing practices, it would seem to me that the CIM as a whole could be seen as unethical. Because each member represents the Institute as a whole, it is important that all members are of good moral character, and imperative that the CIM excels as a whole in ethical conduct.

Many of us view ethics from different perspectives. Most are influenced by character, obligation, results, or equity. Moral behaviour is good behaviour instilled upon us by our environment. It is through values that moral behaviour is exhibited. These values are basic principles that individuals hold true and are shared by the organization.

Such values could, for example, be strong family orientation, patriotism, and respect for fellow humans. Values then are closely related to beliefs. When we believe in something we tend to develop a broad concept that turns into a value. Such beliefs are mental

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acts that place confidence and conviction in something or someone. Once we hold something to be just, true or good, we naturally develop general values around our beliefs that in turn dictate our morals.

In today's business climate, a discussion of ethics is as relevant as ever. The topic seems to be on the front page of just about every magazine, since current business scandals started with Enron and continued with a number of businesses including WorldCom, Arthur Anderson and others, and now Wall Street.

As an example, a person whose actions are based on fulfilling an obligation may think he/she is behaving ethically, while a person that bases his/her decisions on character may not feel the same. Likewise, people who are results oriented tend to look at benefit versus cost; consequently, their decisions may be perceived as unethical. Results oriented people consider the greater good for an organization or society as a whole. On the other hand, character oriented people probably look at the virtues a particular decision represents. As you see, this review is a challenging project and I welcome your thoughts.

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Generating sales leads

By Oluwabamidele Daniel Adeyemi
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A sales lead is the identity of a person or entity potentially interested in purchasing a product or service, and represents the first stage of a sales process. The lead may have a corporation or business associated (a B2B lead) with the person(s). Sales leads come from either marketing that is "lead generation processes" such as trade shows, direct marketing, advertising, Internet marketing or from a sales person prospecting activities such as cold calling. For a sales lead to qualify as a sales prospect, or equivalently to move a lead from the process step *sales lead* to the process *sales prospect*, qualification must be performed and evaluated. Typically this involves identifying by direct interrogation the lead's product applicability, availability of funding, and time frame for purchase.



A potential customer or "prospect" is first identified as a sale lead, which simply means the salesperson has obtained information to suggest that someone exhibits key characteristics that lend them to being a prospect. For salespeople actively involved in generating leads, they are continually on the look out for potential new business. In fact, for salespeople whose chief role is that of order getter, there is virtually no chance of being successful unless they can consistently generate sales leads.

Process of generating sales leads includes the following:

- Market Monitoring – Through this approach, leads are obtained by monitoring media outlets, such as news articles, Internet forums and corporate press releases.
- Canvassing – Leads are gathered by cold-calling (i.e. contacting someone without pre-notification) including in-person, by telephone or by email.
- Profile Fitting – Uses market research tools, such as company profiles, to locate leads based on customers that fit a particular profile likely to be a match for the company's products. The profile is often based on the profile of previous customers.
- Data Mining – This technique uses sophisticated software to evaluate information (e.g. in a corporate database) previously gathered by a company in hopes of locating prospects.
- Prospect Initiated – Includes leads obtained when prospects

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Sales leads

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initiate contact such as when they fill out a company Web site form enter a trade show booth or respond to an advertisement.

- **Personal and Professional Contacts** – A very common method for generating sales leads uses referrals. Such referrals may come at no cost to the salesperson or, to encourage referrals, salespeople may offer payment for referrals. Non-paying methods including asking acquaintances (e.g. friends, business associates) and networking (e.g. joining local or professional groups and associations). Paid methods may include payment to others who direct leads that eventually turn into customers including using Internet affiliate programs (i.e. paid for Web site referrals).



- **Promotions** – The method uses free gifts to encourage prospect to provide contact information or attend a sales meeting.

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Why do many small businesses fail?

By Oluwabamidele Daniel Adeyemi
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In today's business climate, it isn't always the most innovative product or the one that is first to market that generates the most success. Two-thirds of new businesses survive for at least two years, and only 44 percent survive at least four years. Success and longevity of a company are determined by the strength of its business systems. Why some businesses fail and why some succeed is a matter of debate, although there are some common mistakes that can sink a business in no time.

Give your new business venture a fighting chance by taking care to avoid these crucial errors:

1. **Overexpansion.** Growing too fast (know what the company's sustainable growth rate is) - You may have an incredibly successful product. Sales orders are flowing in faster than you can keep up with them. You order more inventories to build more products. You add additional shifts to production. You add more sales people. You keep on adding to your organization. The faster you grow, the more cash is required to run the business. The rate of sales growth drives the organization to add infrastructure. There is a time lag between the addition of infrastructure and the collection of cash from the sales that infrastructure supports. When the initial "capacity" is added to a business, that additional capacity isn't efficient and effective. It often reduces the existing capacity of systems and processes due to the need to train, implement and install new inputs.
2. **Too Many Targets** - A company may be able to define the opportunities it wants to pursue, set measurable targets for those opportunities and still not succeed because it doesn't have

the resources to pursue all of the opportunities.



3. **Rigid roles** - There are times at every stage of a business that the team members have to step out of the box and up to the plate to deal with a business challenge. In start-up stages, it may mean everyone working to pack the goods to ship to the customer. At another stage, it may mean everyone working to take an inventory on a weekend. Whatever the task, individuals and teams need to be willing to do what needs to get done.
4. **Poor capital structure.** Look at the businesses that fail and you'll find that many of them took on too much debt. Learn to pay strict attention to your finances and keep careful records of all money coming in and going out. Even if everything's coming up roses today, trouble can still be right around the corner.
5. **Overspending.** Many startups spend their seed money before cash has begun to flow in at a positive rate. This often happens because of misconception about how business operates. If you're just starting out in business, seek out seasoned veterans you can bounce your ideas off of prior to making big financial commitments.

Why small businesses fail

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6. **Lack of reserve funds.** Failing to prepare for volatile markets and uncontrollable costs like energy-rate increases, materials, labor, natural disasters, and the like is another top reason many businesses fail. Make sure you protect your investment and keep enough reserve cash to carry you through market downtrends and seasonal slowness.
7. **Bad business location.** Don't let a cheap lease tempt you into opening your doors in the wrong neighborhood if your gut is telling you it's not right. Key factors to consider include competition (how many other similar businesses are located nearby?) and accessibility (is the area well served by freeways, public transportation, and foot traffic?).
8. **Poor execution and internal controls.** Poor customer service, accounting controls, and overall employee incompetence can all combine to bring down the ship. Make sure you and your employees place a premium on customer service to generate repeat business, establish protocols for how tasks should be accomplished, and remain continually in the know on all things accounting.



9. **Failure to change with the times.** The only constant in business is change. Once mighty behemoths fall to earth while unknown upstarts rise to prominence. The ability to recognize opportunities and be flexible enough to adapt to changing times is a

key ingredient to surviving and even prospering in the toughest business climate. Therefore, learn how to wear multiple hats and to generate new interests and areas of expertise.

10. **An inadequate business plan.** (strategic or financial, including cash management, funding, and spending plans (budgets)) - Numerous businesses succeed without formal plans. Few businesses succeed without any plans. Take the time to analyze and develop strategic plans that address where you want to take your business over the next three to five years. Then take the next step and put the numbers to those plans. If you want to sell \$5 million of products this year and \$50 million by year 5, what does it take in resources and investment? How many people do you need? Computers, equipment, offices, marketing, telephones, and so on? What are the numbers and where do plan for the cash to come from to fund those efforts?

11. **Ineffective marketing and self-promotion.** Customers can't walk through your front door if they don't know you're there. Learn how to cost-effectively advertise and promote your business through such tried-and-true methods as direct mail, ads in local newspapers, Web sites, blogs, even by sponsoring a local little league team. The number of advertising and promotional ideas that exist is only limited by your own creativity.

Underestimating the competition. Consumer loyalty doesn't just happen; you have to earn it. If you don't take care of your customers, your competitors will. Watch your competition as closely as you do your own employees.

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Conestoga College takes OCMC 2008—12 years in top 3

Conestoga made it 12 consecutive years of top three finishes, but did something they have missed since 2004; taking the top prize at the 2008 Ontario Colleges Marketing Competition. With 54 points, they were well ahead of Niagara, at 47, and St. Lawrence at 45. Consistency was key for the winners, placing in the top five in eight of the ten events outside quiz bowl. For the first time, those finishing fourth and fifth were announced.

The Institute's Executive Director, Grant Lee, MCIInst.M., RPM was a guest judge for the Market Research competition module. He was included in a team of experienced marketers who awarded first place to Sheridan College followed by Niagara and Algonquin.

Every year in November, Ontario's top college marketing students get together to see who can do the best in a set of events designed to test students on the practical, under-the-gun skills that faculty strive to inspire in them. The 2009 competition will be hosted by Mohawk College in Hamilton. The Canadian Institute of Marketing is a sponsor of the annual competition.

The event was initiated in 1980 among 6 colleges. In 1986, the event was hosted by Mohawk College in Hamilton which reached beyond the original six, inviting every college to participate.

Category Management (Increase profits by managing Categories—insights for retailers)

By Prasanna Perera, F.C.I.M. (UK), MCIInst.M., FCIInst.M., M.S.L.I.M.,
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Prasanna Perera, MCIInst.M., FCIInst.M.

Marketing basics and category managers

Today, we are living in the backdrop of a mad, mad, mad marketplace. Retailers and manufacturers of fast moving consumer goods are consolidating. The big are getting bigger, while the small are either merging, being acquired or going out of business.

The way out of the madness starts with a solid foundation built on the basics of marketing. Who are the customers? What do they want? Despite this new era of competition and product proliferation, business success is still about having the right product, at the right price, with the right promotional support and in the right place.

Category management emerged in the early 1990s as a method of turning marketing basics into an organized process. Category management builds on the marketing basics to help retail-

ers and manufacturers reach consumers. Clearly, understanding how to manage categories for these groups is critical. Trading partners need to leverage the power of categories, to drive higher shopper penetration, increase shopping frequency, and encourage larger basket size. Shoppers go to the store to buy products. Retailers must figure out what categories will drive desirable behaviour in the store.

The purpose of category management

In today's context, category management is more than a way to manage a category as a business. It is essential to the successful retail operation. Moreover, the process can give retailers a powerful competitive advantage if executed well. The winners in the marketplace will be those companies that satisfy consumer needs by knowing how to integrate data, insights and merchandising.

Evolution of category management

The retailers that pioneered category management are among the largest chains in the United States. Safeway was one of the original practitioners. On the manufacturing side, Philip Morris and the Coca Cola company were early supporters of category management.

In the early 1990s everyone involved in category management focused on the data and what the numbers revealed about product movement and the category. Surprisingly, they forgot that the consumer drives what

happens in the category. The biggest change in category management over the years has been more of a focus on the consumer.

Consumer centric category management

To make the category management process more consumer centric, the following components were addressed.

- Clever segmentation and targeting of consumers. This is to get the right products, in front of the right shoppers, in the right stores.
- Grouping retail stores based on the sales potential of brands or categories.
- Determining the differences between existing sales and potential sales in a category.



It must be clearly understood that consumer behaviour changes the categories. If you are not getting a fair share of the category, chances are that you are not doing a good job of understanding consumers and satisfying their needs.

Category management

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Category management beyond supermarkets

Although category management started as a process for supermarkets, it has now become clear that its benefits are applicable to other retailers as well. Borders (books) and Home Depot (home improvement) now employ category management.

Category management and the retailer's strategy

A good retailer strategy is made up of the following components:

- Knowing who you are. The retailer must be aware of the store's position in the market.
- Know your consumers. The retailer needs to know who the shoppers are, and what they want in a store.
- Be able to execute the strategy. The retailer will be able to carry out the strategy more easily, if everyone understands the strategy and works to execute it.

Every retailer should have a mission statement. The mission statement specifies why the company is in business. Ideally, retailers carry out the mission with a well conceived strategy and effective tactics.

The eight foundational steps of category management

1. Category Definition – is to determine the products that make up the category.
2. Category Role – to assign the category role (purpose) based on a cross-category analysis. (Considering the consumer, distributor, supplier).
3. Category Assessment – to conduct an analysis of the category's

subcategories, segments, brands and stock keeping units.

4. Category Scorecard – to establish the category's quantitative/ qualitative measures.
5. Category Strategies – to develop the marketing, product supply and in-store service strategies for the category.
6. Category Tactics – to determine the optimal category assortment, pricing, shelf presentation and promotion tactics, to achieve the scorecard measures.
7. Plan Implementation – to develop and implement a written business plan.
8. Category Review – to measure, monitor and modify the category's progress on a timely basis.



While an increasing number of organizations are customizing or streamlining the eight step category management process, it is essential to fully understand the original eight steps, both their objectives and methods of execution.

The future—category management

The key to sales and profits in the packaged goods industry is the consumer, who resides between the manufacturer and the retailer. To develop and optimize the relationship with consumers, trading partners have to leverage consumer touch points.

In the past, the marketplace was characterized by a push-pull effect. Proctor & Gamble (P&G) advertised a new product on TV (push) prompting the retailer to stock the product (pull). Today, media is so diverse that the push-pull technique doesn't work so well. That's because retailers have become the gate keepers of the shelf! If Wal-Mart does not list a new product from a company like P&G, the manufacturer will be in serious trouble (by missing key distribution)

Another important factor is that retailers are accumulating more consumer insights through their POS data and some retailers are wondering whether they even need manufacturer data anymore.

Finally, the growth of private labels will also have a major impact on category management. Retailers are producing better private label products and thereby strengthening their bond with the consumer.

Manufacturers would do well to understand the retail strategy and to align their category management efforts accordingly. If retailers and manufacturers work more closely, category management can be improved in the future, for mutual benefit.

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For marketing communications— Watch your language!

By James A. Schauer, MCIInst.M., RPM, FCIInst.M.



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Marketing success is like a well orchestrated concert. Unless all team members perform as one, the outcome is unlikely to please customers. Marketing graduates will know its most basic four principles: Product, price, place and promotion, of which the first three are relatively easy to grasp. Most challenges, however, arise with promotion, the mix of verbal, nonverbal, oral and visual communications linking their business with its customers.

For this we must first *understand* customers' expectations and value perceptions, as basis for effectively communicating our services, using language, images, colour and timing that have the same meaning to customers. If these needs are not met, they will go elsewhere and the promotional effort is wasted. In practice, much promotion does not always communicate. Although logical, the solutions are not always as obvious.

Begin with the customer . . .

Customer expectations are becom-

ing more unique and the need for understanding these expectations is increasing daily. For successful business outcomes in this changing environment, awareness of customers' value perceptions and meaning systems is also becoming ever more important. This intelligence and how to apply it effectively is power for future business success.

Years ago our lawyers advised me: "Always be sensitive of the changing market needs before developing promotional material. Then be careful with every word, image or gesture - or it will come to haunt you later! Simply put: Watch your language." Later, while investigating the causes of customer dissatisfaction for Canada's largest travel wholesaler this wisdom became progressively more meaningful. Analysis then revealed that over 80% of all complaints began from differences between information our catalogues and agencies conveyed and what customers thought our offers meant. Invariably these gaps were due to fundamental flaws in the communications mix and timing employed.

Use plain language, sincerely

As any parent knows, it's not good enough to be heard; it's more important to get through and be understood. Likewise, to meet customers' purchasing intentions - or in the public sector, citizens' ability to comply with legislation - the need for simple, sincere and understandable holistic communications should be as obvious. Yet in practice these needs are often overlooked.

From the outset all our travel brochures were presented in plain lan-

guage, written for the prospective vacationer rather than professional sales experts. Contrasting this, the last page contained our "terms and conditions" in hard to understand *legalistic* language. Very long sentences, peppered with unfamiliar terms effectively diminished the sincerity of preceding pages, thereby causing some 75% of all complaints. After adopting a plain language, user-friendly alternative headed "*what you should know before you go*", these complaints declined drastically, at impressive savings in processing costs.

Sometimes language is purposely misused in recruiting advertisements, when junior sales vacancies are described as marketing positions. "Marketing" may indeed have more appeal; but sales and marketing are not the same. Such misuse is not only dishonest in raising applicants' hopes, but it also risks tarnishing the business' image and increases resource needs for evaluating larger application volumes. Similarly, the growing use of "telemarketing" has little to do with marketing, but ultimately it can also affect the business' image adversely.



Simplify complex issues

Promotion of core services with delayed benefits, including insurance, mortgages, vacation travel, religious faiths or government programs may not always be associated with

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Watch your language

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“marketing”. Yet all services designed to help customers reach intelligent purchase decisions, support a particular cause or comply with laws can significantly benefit from the application of sound marketing practices. It is here just as important to fully understand customers’ expectations before developing communications that can also connect with customers.

Complex services should always be simplified to be understandable among people with average comprehension levels. Communications must focus on positive benefits, be carefully and honestly explained in plain language - without insulting customers. Emotionally sensitive issues aimed at changing human behaviour, like adjusting to global warming or controversial issues with financial or legal implications should be covered only after all benefits have been fully explained.

Contrary to growing practice, use of the Internet for *effectively* conveying complex issues is still risky and prone to misinterpretation or distortion by third parties. To develop positive marketing relationships, early steps must include educating the media and all frontline agents. Since no two marketing regions are ever the same concerning their likes, dislikes and language, the communications mix must also allow for the unique needs of each market.

Communication planning

Marketing communications for intangible services should avoid specialist jargon or legal terminology and provide for emotional concerns as well. Until recently, satisfaction of customers’ needs and expectations was a prime consideration, yet in the pre-

sent economic climate their focus is clearly shifting towards greater sensitivity involving both price and value perceptions. Promotional language should thus become sensitive to growing customer concerns of “what’s in it for me?”



Use of internally appealing language can easily lead to ambiguities, confusion and complaints from customers, if it does not connect. A practical solution to reduce this risk is to have all promotional texts proofread by an independent outsider before their release to printers. For instance, most travel agents may have flown hundreds of hours; but many others still feel uncomfortable about take-offs and landings. They prefer to avoid flights including additional stops en route to their destination. In practice, multi-stage flights are usually promoted as “direct” flights, but it is not uncommon, albeit misleading, to offer them as “non-stop” operations. Since the average traveller cannot be expected to know the technical difference, this alone is sure to raise dissatisfaction and complaints, if not sincerely explained.

It may seem obvious that language, graphics and media must always blend together to support the need for positive holistic communications; but this rule isn’t always followed. Following my work in resolving travel complaints for a year, when complaints were mostly due to ambiguous brochure statements, my staffs were invited to

proofread all brochures texts (without graphics) - from a customer perspective - before printing. After clearing the first catalogue I was appalled to see that pictures had been inserted to imply that clients would be accommodated in better and much more expensive rooms than correctly described and priced in the text.

Promotion timing

For most effective communications, timing is crucial, which is often also overlooked. Obviously, no business wants negative media coverage; but going to press too early can have an adverse effect when unforeseen changes arise. For instance, pharmaceutical companies in search of a competitive edge often publish research results for new medications, raising hopes of sufferers with asthma, diabetes or cancer - only to conclude that these drugs will not be available for another 5 years.

Tactical timing for large volume time-limited services is particularly important. Where charter travel sales are running ahead of plans, they must provide for curtailing advertising and reallocate funds to weaker programs or contract for additional flights. Conversely, when close to a departure date the need arises to fill unsold seats, an early \$25 discount six weeks before the flight is usually more effective than a \$100-plus reduction within a week of departure. Both scenarios require provision for alternative tactics during initial planning.

Even government programs are not immune from imperfect timing. For instance, some years ago we investigated a program designed for farmers to benefit from fuel tax exemption which, in spite of heavy radio

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advertising was largely ignored. Very low rates had been obtained for this purpose, but it soon transpired that these rates were for radio broadcasting after midnight. This solution might have been ideal for long distance truckers driving through the night; but it was most inappropriate for farmers needing their rest during that time.

Use of technology

Sales agents for intangible services were often taught to “sell the sizzle, not the steak”. Since then the use of technology has become commonplace, with fewer human contacts. This development is now being extended for promoting lengthy, complex information on the Internet, involving travel, insurance, drug benefits, government programs and, most recently, plans for fighting global warming.

Unfortunately, the Internet is not as well suited for *effectively informing* large population segments than more traditional marketing methods. No business can develop a positioning strategy in a vacuum, no matter how advanced the technology. It can only succeed if it understands the marketing environment which the business desires to serve.

Today, research results are obtained faster with technology, with little human interaction. However, without meaningful feedback there is no assurance that planned communications can actually reach the desired market segments. Even if they do, it will be hard to determine whether customers can also understand the promotional material well enough to respond positively. This becomes a problem with more lengthy documents of less importance to pro-

spective customers. Convenience and low cost may be very attractive from a frugal executive’s perspective, but this does not necessarily translate into best promotional effectiveness and value.

Marketing research may be employed to determine communications needs; but this research also has its limits for providing the necessary insight for designing effective communications in a constantly changing, increasingly competitive environment. The environment in which research is undertaken is often quite different from the actual decision-making environment.

Over the years we’ve increasingly discovered that, while statistics may not lie, they don’t understand the customer either. There is thus no substitute for routinely meeting with, and listening to customers, employees, agents and suppliers, as a critical step to sound communications planning.



Think and act positively

For marketing communications, the use of positive language is always preferable to negative statements. Superb examples can be found in some unconventional applications. For one, Pastor Robert Schuller began his ministry from atop a drive-in cinema, using its speaker system to address a congregation previously neglected by others: handicapped worshippers attending his services in their cars. Using *holistic* marketing concepts, he raised funds for building his Crystal Cathedral as base for his powerful,

worldwide success through using modern marketing communications - without neglecting his earliest local supporters. From the outset he also departed from the age-old God-fearing style of service, focusing on messages of love and hope for positive living. Also, he regularly invites leaders from other beliefs as his way of building bridges between different faiths.

Conclusion

Promotions of services to meet customers’ needs and expectations play a vital role in linking businesses with their customers. For this it’s most important to *understand* their value perceptions as basis for communicating effectively. But communication is equivocal in that we are limited by language, where words may mean one thing to one person and something quite different to others.

Customer disappointment invariably grows from the gap between what we understand and what we think we should understand. As a result, promotion often fails to communicate. In turn, this leads to costly complaints from customers, likely to harm the business’ corporate image.

Most causes of a customer’s dissatisfaction and complaints reflect a lack of comprehensive thinking or not planning promotions holistically. The only solution is to get language, media mix and timing right to begin with, in simple words: “Watch your language!”

Jim Schauer again draws on his vast experience as VP Marketing and general manager for a major international tour operator, in the financial services sector, manager of major survey/mapping projects and as marketing services consultant to several Ministries in the Ontario Government. He is president of Easton Marketing Services Ltd., based in Brighton, Ontario. He can be reached at james.schauer@sympatico.ca

The marketing process

By Dr. Ranjan Madanayake, DBA, CPM, FSPMgt, FSBP, MCIInstM, RPM, MMA, MNZIM, MIM (SL), MSLIM



Dr. Ranjan Madanayake,
MCIInst.M, RPM

The ultimate aim and goal of any business organisation is to make a profit. If a business organisation does not do that, it cannot run, and is likely to fail simply because no stockholder, potential investor or lending institutions would want to, or continue to, support a loss-making business indefinitely.

Therefore, businesses need to achieve profitable sales volume and to do so they need to identify, create, sustain and grow profitable markets. The management process that enables this is marketing. "You can have the most modern fleet of airplanes properly outfitted with the latest seats, but you only make money if you put butts in those seats" (Zyman, 1999).

Marketing aids the organisation to identify and exploit business opportunities. It enables a business to grow profitable markets by providing superior value. Superior value is the result of a cluster of benefits of an offering (product, service or idea) the company is able to provide its target market to satisfy their needs and wants

beyond expectation. It is the total value proposition that is offered to delight customers. Today all companies are capable of satisfying needs and wants but a very few are able to delight them. Those who delight customers achieve superior results while those who don't— perish—some quickly and others slowly but surely, because there are so many options available.

A motel offers basic accommodation with no service, food or drink but to some it provides superior value than a hotel that offers service, food and drink, health club, business centre, and in-house entertainment. Superior value is want-oriented and does not mean to be the Rolls Royce of each category or product. A man who needs clean accommodation with basic facilities of a toilet, pantry and parking will find superior value in a motel than in a hotel. Similarly, some may prefer a BMW while others a basic model from Toyota. The latter offers basic facilities to get from point to point, but they may find superior value in it than in the BMW, which is known for being the ultimate driving machine. Toyota may be cheaper to maintain than the BMW, as it may offer better fuel economies, lower initial investment.

Marketing is a mind game; it is also warfare and its battlefield is not the market place, store or the place of use or consumption but the target customers' mind. "Marketing battles are fought inside the mind.— inside your own mind and inside the mind of your prospects," (Ries & Trout, 2003).

Those who dominate customers' mind, and continue to do so, will win over others who will fail to dominate the customers' mind. Those who fail

will lose the battle and consequently the war. The sole intention and goal of providing superior value is to create competitive advantage and 'wow' customers to one's own brands from those of others, or retaining their customers from going to others.

"The purpose of marketing is to identify, create and sustain competitive advantage and drive a business to sell more goods, services or ideas to target markets at profitable prices" (Madanayake, 2002).

No matter how good a piece of art or a philosophy may be in word or on paper, if it isn't productive, it is of little use or benefit. If it can be made to be productive by being implemented as a management process, only then can it be used for the greater efficiency of utilising organisational resources and making profits. Marketing has proven that it can be used as a management process effectively. Many writers interpret the marketing process differently. My problem was to identify the right marketing process. Hence what really is the marketing process is? This is an attempt to answer that.

In summary, the marketing process is a management process of gathering information and analysing situations, identifying key issues and making assumptions, determining the organisational vision and mission, setting goals and objectives and developing a strategy and tactics to achieve the objectives, and finally the administration of the total process by planning and thereafter the implementation and control.

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Five stages of the Marketing Process:

1. **Investigative Marketing** – information and analysis of markets and marketing environment, customers and their buying behaviour, marketing intermediaries and other collaborators, competitors and competitive activity and the internal environment of the organisation.
2. **Directional Marketing** – ascertain key issues, make assumptions, determine the right vision, choose the appropriate mission, set goals and objectives.
3. **Strategic Marketing** – segmenting markets, targeting market segments, differentiating and positioning the value proposition.
4. **Tactical Marketing** – delivering the positioning through the marketing mix: product, price, place, promote, people, process and physical evidence.
5. **Administrative Marketing** – preparing the marketing plan, implementation, and control through a process of evaluation and marketing audits

Investigative Marketing

A clever engineer built an effective mousetrap, more superior than its inexpensive existing cousins. The new product cost more than double than that of a competitive product and was priced likewise. After its successful launch, where many housewives exercised their right to 'curiosity purchase,' it never enjoyed repeat customers. This baffled the

engineer who ultimately learned that housewives used the inexpensive mousetraps to catch mice and when they were caught both the trap and the mice were disposed as garbage. The mousetrap in effect was a disposable product. The mousetrap the engineer designed didn't come with a disposable price. If the engineer had enough information of the behavioural pattern of housewives using mousetraps, he never would have ventured to make such an expensive one. He may have alternatively used his engineering wisdom and skill to produce something cheaper than that in the market, which could have also saved the housewives some money.



The moral of the story demonstrates how important information is to marketing. The first thing the company must have is the right information of the macro environment in which it operates and then the total market, its potential and existing customers and their buying behaviour, its collaborators, and its competitors. It must thereafter be concerned about its own products and services, its sales, its market share, pricing, profitability and costs. From available statistics the company can tabulate information in terms of sales volumes, growth, and profit. It would also tell the company where it is and its own market share. Market share is one sure way to increase profitability. If a company can get more market share and make more sales to more people and at the same overhead costs, or at a marginal increase, it makes sense that the profit-

ability of that company would rise.

When I joined a company on the decline as its marketing manager some years ago, a consultant who came to rejuvenate the business asked how to increase profitability? The finance manager jumped up and said cut costs. Cut costs they did, and the marketing communications budget as well, which led to the drop in off-take and resultantly the sales, and consequently our market share. I was later able to convince the general manager that marketing communications is an investment, and not a cost. With difficulty, marketing expenditures were reinstated to win back sales and our lost market share.

A company must periodically analyse the prospects and determine its strengths, weaknesses, opportunities and threats. The first step to analyse its prospects would be to ascertain the industry attractiveness or the five competitive forces:

1. Rivalry among existing companies.
2. Threat from potential or new entrants.
3. Threat from substitute products.
4. Bargaining power of buyers or customers.
5. Bargaining power of suppliers.

There are other very useful analyses the company can undertake:

- Pareto analysis will help determine key customers and therefore focus on them to retain and grow them. It can also be used to identify which products bring greater revenue and make a better contribution.

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- Product Life Cycle analysis to ascertain its current status – launch, growth, maturity or decline and take corrective action to accelerate growth or maintain maturity or retard decline or even re-launch.
- Portfolio analysis will help to identify the position and performance of each product classified as a cash cow, a star, question mark or a dog and through this analysis seek a strategic direction.
- GAP analysis will enable the plotting of future trends in sales or profits and help decide and implement necessary action to fill the gap.
- SWOT analysis will indicate the strengths, weaknesses, opportunities and threats. A Marketing SWOT would also provide the marketer an insight of marketing strengths, weaknesses, opportunities and threats.

A company can use such valuable information and analysis to observe the realities in the external and internal environment.

Directional marketing

From the information and analysis gathered, the company could ascertain the key issues relevant to it and its product portfolio and make rational and appropriate assumptions. Key issue for a company serving the health sector can be the reality of finding protein under-nutrition among children in the low-income groups of the country. A natural assumption would be the opportunity to develop low cost high protein nutrition for low-income group children.

The right assumptions would enable the company to identify an appropriate vision. To drive that vision it needs to prioritise a mission. Mission is the ultimate purpose of the company – all its stakeholders must know it. Mission is the purpose for the existence of the company. Mission is not an ornament for display, as done in most companies. Hanging a well-framed mission statement isn't enough. It is for the purpose of communicating to its stakeholders what it stands for, its purpose and what it intends to achieve. The mission must be very clear and achievable. Once the organisation's mission has been prioritised the next step is to set itself goals to deliver its mission and thereafter determine objectives to achieve those goals. Goals are intentions for action and operational goals are expressed as objectives that are specific, measurable, achievable, result oriented and time focused.



Strategic Marketing

Strategic Marketing is long-term, and the most critical aspect of the total marketing process. It concerns the most important strategic elements:

Market Segmentation;
Targeting Market Segments;
Differentiating; and
Positioning.

A company in the logistics industry who was very strong in airfreight focussed on air and dominated that category. They didn't chase after ocean, as the contribution wasn't good enough being largely rate driven. Hence, they were the leaders of air, and their ROI was better than those who were passionate on ocean freight. They were known as the best airfreight company. This demonstrates the significance of segmenting and targeting. They segmented the freight market by category and targeted the more profitable airfreight segment. Similarly, Dominos identified a new segment, pizza lovers who wanted home and office delivery. They focused on delivery and became good at it allowing their competitors the sit down business, which they avoided. They are the leaders in doorstep delivery. Markets can be segmented in the following manner (Kotler, 2003):

- Geographic – region, city or metro size, density, climate.
- Demographic – age, family size, family life cycle, gender, income, occupation, education, religion, race, generation, nationality, social class.
- Psychographic – lifestyle, personality.
- Behavioural – occasions, benefits, user status, usage rate, loyalty status, readiness stage, attitude towards product.

Once segmenting is completed, the next stage is targeting this is done by (Kotler, 2003):

- Single segment concentration – specialising on one segment.
- Selective specialisation – different products for different segments.

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- Product specialisation – single product for several segments.
- Market specialisation – several products for a single segment.
- Full market coverage – serve all segments with a single / differentiated value proposition.

On completion of targeting market segments to serve, the next stage is to differentiate the offering. Jack Trout with Steve Rivkin has written a best seller titled *Differentiate or Die* which provides the reader in-depth knowledge of this important aspect, but it is too detailed to mention here due to space concerns. Kotler (2003) offers the following differentiation variables:

- Product – form, features, performance, conformance, durability, reliability, repair-ability, style, design.
- Services – ordering ease, delivery, installation, customer training, customer consulting, maintenance and repair, miscellaneous.
- Personnel – competence, courtesy, credibility, reliability, responsiveness, communication.
- Channel – coverage, expertise, performance.
- Image – symbols, media, atmosphere, events.

In today's ultra competitive world, one cannot survive as a 'me too.' Not only must one differentiate, but it must be desirable and done in a way that competitors cannot emulate. Price, for example, is seldom a good variable because competitors can emulate it in 'next to no time'. The exception, however, is Wal-Mart.

Once differentiation is significantly

achieved, the next task is positioning, known as the heart of marketing – Kotler (2001) offers the following:

- Broad positioning;
- Specific positioning; and
- Value positioning.

In their book *The Discipline of Market Leaders*, Treacy and Wiersema (1996) offer an interesting hypothesis which they call the value discipline. According to them, there are three alternatives:

- Operational excellence;
- Product leadership; and
- Customer intimacy.



Their notion is that an organisation must be excellent in one position, and reasonably good in the others. A company can choose a broad positioning as being customer intimate, operationally excellent, or be the product leader and be technically very competent. Alternatively, they can focus like the previous example of the company that focussed on airfreight, or find some exploitable difference and differentiate the offering. The foregoing are useful examples to consider when positioning a company.

Kotler (2001) asserts the following when considering products:

- Attribute positioning – claim an attribute such as the oldest hotel.
- Benefit positioning – claim a single major benefit or multiple benefits.
- Use and application positioning – claim it is best for a use: walking.
- User positioning – claim being best for users like graphic designers.
- Competitor positioning – claim superiority over competition.
- Category positioning – claim leadership of category, No 1.
- Quality and price positioning – claim a quality to price relationship.

Trout and Reis (1996) offer the following alternatives:

- Strengthening current position in the consumer's mind.
- Grabbing an unoccupied position.
- De-positioning or re-positioning competition.
- Initiating an exclusive club strategy.

Competitors cannot be ignored as they steal one's business, and the following options are proposed to counter competition:

- Defensive Positioning – if you are the market leader, position as No. 1 / super brand or position as a continuous improver and block strong competitive moves with quick response.
- Offensive Positioning – this is appropriate for a No. 2 or a challenger. Emulate the leaders positioning by finding a weakness in the leader's strength and create a positioning on that weakness, or

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launch on a narrow front as possible avoiding head on confrontation.

- Flanking Positioning – this is the ideal for new entrants, or those value propositions that had failed. Focus on an uncontested area and try to create a new sub-category, or choose a positioning that is unexpected.
- Guerrilla positioning has three principles – serve a niche and do not disturb the leaders by remaining focussed and staying in that category or segment.

Tactical Marketing

Once the strategic marketing elements are decided, the company must develop tactics to drive them. The marketing – mix is the driver:

- Product .
- Price.
- Place.
- Promote.
- People.
- Process.
- Physical Evidence

Developing the value vehicle, packaging and branding to delight the identified target market segment, pricing it, placing it within reach and promoting it to create trial (new) and demand (existing) is the essence of tactical marketing. Training and motivating people, developing the process of providing value, and creating physical evidence of delivering value in the correct environment in the case of marketing services are key aspects of tactical marketing to delight customers. Ultimately the purpose of tactical marketing is to deliver positioning – the final element of strategic marketing.

Administrative Marketing

Nothing can be achieved, if there is no plan. Failing to plan is the first step in planning to fail. Preparing a marketing plan is an essential condition or prerequisite. Implementation and control are the other components of administrative marketing. No matter how good all the other elements of the marketing process are, if implementation and control is inadequate it is bound to have pitfalls. Hence administrative marketing is:

- Developing the strategic marketing plan; and
- Its proper implementation control.

Please contact me at rpmadanayake@sltnet.lk, if you wish to discuss this article.

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- Dr. Ranjan Madanayake is Author **Strategic Marketing Plan – The 12 ‘P’ Model**, Sri Lanka . Author **PCM Study Text**, Sri Lanka Institute of Marketing. Co-author **The Marketing Collectibles**, New Zealand & Malaysia. Co-author **Marketing Skills in Management**, India. Co-author & co-editor **Marketing Perspectives**, Canadian Institute of Marketing. Honorary member of the International Academic Board, **Phoenix International University**. Country Director, **Global Marketing Network**, UK.

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About Us

Kunle Victor Fagbade, ACInst.M
MD/CEO

Mr. Fagbade has joined Avant-Garde & Associates as the MD/CEO.

Avant-Garde & Associates Limited is a marketing communication organization. It engages in marketing (channel), indoor/outdoor advertising, market research and feasibility studies, printing and proposal for SMEs and multinational companies and providing solutions to the ever worrisome situations in the everyday lives of individuals, organizations and governments. The company is located in the heart of the federal capital territory of Nigeria and is publicly listed on the Corporate Affairs Commission as a Limited Liability Company.

See www.avantgardeandassociates.com.

Ron 'Doc' Halliday, MCIInst.M.,
RPM, FCIInst.M.

Ron Halliday has been appointed to CEO of Twin Creek Media. Ron or 'Doc' as he is known by his friends brings extensive agency, marketing and corporate business improvement experience to Twin Creek Media. His agency background includes working with realtors, developers and builders, retailers and business leaders in a wide variety of market segments including commercial interiors, cosmetics, packaged consumer goods, transportation, insurance, health care, telecommunications and municipal government over the past twenty five years.

Ron, previously operated Marketing Dynamics Intrinsic Communication Solutions Ltd, a national boutique agency dedicated to providing fully integrated marketing, advertising, business improvement and training solutions prior to moving to Kelowna. Ron is best described as a

Strategic Imagineer, known for his expertise in stewarding business leaders through the process of visioning and addressing complex cultural change issues.

See www.twincreekmedia.com.

Howard Pearl, MCIInst.M., RPM

Mr. Pearl was appointed Chief Operating Officer October 1st, 2008 of Identica. Mr. Pearl is a senior executive with more than 25 years of successful business experience with a record of achievement in both private and public companies. Howard has led startups from \$0 to \$6 million in less than 3 years, and as CEO of Microform, the company grew from \$10 million in annual revenue to over \$80 million. He has been involved in the marketing or positioning of products or services for: Ford Motor Company, Lincoln Mercury, Converse, Johnson & Johnson, and Microsoft. One of Mr. Pearl's strengths has been building structure, internal process, and accountability to facilitate rapid growth. Mr. Pearl joined Identica after 5 years as CEO of Rhino Outdoor Industries Inc. where he engineered the sale of the company to a public entity. He attended Harvard Business School in Cambridge Massachusetts and is a Registered Professional Marketer with the Canadian Institute of Marketing in Toronto Canada.

Identica is a startup company specializing in biometric identification. See www.identicacorp.com.

Lemali Pathirana, MCIInst.M.

The Chartered Institute of Marketing has upgraded the membership of Ms Pathirana to member, effective November 26, 2008. she may now use the post nominal, MCIM.

Lemali returned to Dubai and joined

an advertising agency called Axis Integrated FZ-LLC as an Account Manager. Axis is a full service agency based in Dubai.

Ranil Herath, MCIInst.M., RPM

Mr. Herath, vice chair of the Canadian Institute of Marketing has been appointed President of the DeVry Institute of Technology in Calgary. The DeVry Institute of Technology offers six bachelor's degree programs in business and technology. DeVry Canada LLC, which operates DeVry Institute of Technology in Alberta, is owned by DeVry University, one of the largest degree-granting higher education systems in North America. In Canada, the government of Alberta grants accreditation for baccalaureate degrees awarded by the DeVry Institute of Technology in Calgary. See www.devry.edu/calgary.

Canadian Institute of Marketing

The Institute is moving quickly to provide webinars to its members throughout 2009. The biggest challenge to the Institute is to provide continuing education opportunities to all of its members, no matter where they are located on the planet, and to hold frequent council meetings considering different time zones and the high cost of travel. The Institute will be using Go to Webinar and Go to Meeting to improve services.

The Executive Director of the Institute will be carrying out most of the Institute's day-to-day business from various locations in the Philippines between December 6 and January 24, 2009. Annual membership subscriptions will be sent by email in the latter part of December. The due date will be February 28.

RPM renewal notices are now being distributed by email.

New Members and Membership Upgrades (to December 2008)*

| | | | |
|---------------------|---------|----------------------|-------------------|
| Professional Member | No. 833 | James Aniyom | Calabar, Nigeria |
| Professional Member | No. 834 | Lawrence O. Adeniyi | Lagos, Nigeria |
| Professional Member | No. 837 | Ed Carson | Toronto, ON |
| Professional Member | No. 839 | Chanaka Nanayakkara | New Hyde Park, NY |
| Associate Member | No. 832 | Chukwuemeka Eshiokwu | Lagos, Nigeria |
| Associate Member | No. 835 | Abayomi A. Oredegbe | Grand Rapids, MB |
| Associate Member | No. 836 | Emmanuel U. Obinna | Lagos, Nigeria |
| Associate Member | No. 838 | Ezenwa A. Opara | Lagos, Nigeria |

Marketing water conservation—an opinion

By Grant Lee, MCIP, RPP, MCIInst.M, RPM

The world population is expected to reach nine billion by 2050 or so, essentially adding two Chinas to the number of people alive today. Those billions will be seeking food, water and other resources. The global recession in which we now find ourselves is a very clear statement that humankind is living in a global economy in every way. Climate change and population growth is placing demands on fresh water resources that were unimaginable until now.

Every country in the world has either entered into an era, or about to enter into an era of extreme measures to ensure potable water supplies for its people. No nation will be able to compete in a global economy without secure and safe supplies of fresh water. Canada and the United States are pumping \$billions into infrastructure that ensures water and wastewater treatment facilities to accommodate planned growth and the industries needed to support a society. Within a very few decades, accessible and affordable potable water supplies will eclipse the current focus on new technology for clean energy sources and secure supplies of crude oil.

The solution to accessible and affordable potable water supplies will rest squarely on the shoulders of individuals, although governments are

the only bodies able to invest billions in the infrastructure and science that is needed to bring on new sources and deliver water to households and businesses. Water conservation is something that everyone can do, from the family unit to the largest industrial consumer.



The poorest nations in the world know too well the value of fresh water supplies and accessibility, and it is a lesson yet to be learned by the world's richest nations. In many, treated fresh water is no more than a commodity taken for granted and wasted in unimaginable volumes. As attention turns to potable water, and it will, all people will have to consider water for what it truly is—the essence of life itself.

Water conservation policies and plans are quickly materializing at government levels of all kinds, and among citizens through special interest groups and community organizations. Information already abounds in the world's industrialized nations on very easy ways and means to conserve water. The Internet is flush with water conservation guidelines that identify products and techniques for conserving water from capturing and reusing grey water and storm water to restrict-

ing the use of treated water. Even wastewater is being treated and re-used in many regions of the world.

Professional marketers have a role to play in supporting the work of the world's best scientists, engineers and public works officials by taking to market water conservation guidelines and policies that can be embraced by all citizens. This is a serious matter and there is no room for marketing initiatives that take advantage of the situation to market products that are unsustainable because they fail to the test of being sustainable—support by the three pillars of sustainable development; social progress, economic growth and environmental balance.

The marketing of water conservation policies and guidelines is an enormous challenge. It requires ethical marketing, with the sole purpose of encouraging every person in the world's wealthiest nations to do more with less, and encourage their governments to provide the education, tools and ability for people of the poorest nations to build safe and secure potable water supplies for their own societies, so their economies and cultures can flourish. Marketing water conservation is a global challenge requiring professional marketers who are fully aware of their actions.

Membership Requirements

Professional Member (MCInst.M):

- A) Has held an acceptable marketing position for 5 years, the last 2 at senior management.
- B) Holds a recognized qualification in any of the following, or mature entry instead.
- A diploma of an Institute of Marketing;
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 - Diploma or University Post-graduate Diploma in Management Studies, or Business Administration with marketing specialization;
 - Other educational or professional qualification of equivalent or higher standard with marketing input – approved by the Canadian Institute of Marketing or one of its affiliated marketing institutes.

Registered Professional Marketer (RPM)

A candidate must meet the following requirements:

- A) Be a Professional Member (MCInst.M)
- B) Acceptance by Registrar of written case study demonstrating competence in marketing and ethics.

Associate Member (ACInst.M):

A candidate must meet the following requirements:

- A) Has held an approved marketing position for 3 years, the last in marketing management at a lower level than for full membership.
- B) With one of the following academic qualifications:
- A Certificate of an Institute of marketing or, subject to its marketing component being approved by the CInst.M., a BA or MA in a business-related subject;
 - Diploma or University Post graduate Diploma in business Administration or in Management Studies;
 - Other educational or professional qualifications of equivalent or higher standard approved by CInst.M.

Graduate Member (GCInst.M):

A candidate must meet the following requirements:

- A) Have successfully completed an approved Marketing Certificate or Diploma programme from a recognized learning institution, or possess a business-related Bachelor degree.
- B) Be elected by the Institute.

Student Member:

A candidate must meet the following requirements:

- A) Be registered in a Marketing Certificate or Diploma programme;
- B) Be registered in the final year of a degree programme with Marketing specialization. The Marketing component must be approved by, and the learning institution accredited with, the CInst.M.

Fellow (FCInst.M):

- Ten years of membership in good standing (exception rule in place)
- Vote of College of Fellows, Past Presidents and Board based on nomination and application and review.
- Based on leadership, knowledge, experience and sustained membership.

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Organizations that wish to be affiliated with the CInst.M. This category of membership does not carry the right to vote at Canadian Institute of Marketing meetings, or designate a professional designation.

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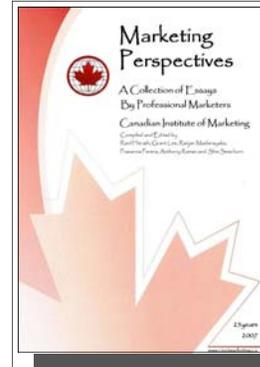
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