

Telling Stories about Strategies: A Narratological Approach to Marketing Planning

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"... a man is always a teller of tales, he lives surrounded by his stories and the stories of others, he sees everything that happens through them"...

(Sartre 2000, p61)

An increasing amount of literature suggests that the narrative form is an important source of meaning in organisations and that it should be harnessed for strategic purposes. This paper argues for this perspective, reporting on some research carried out into marketing planning processes in a variety of organisations, where high incidences of storytelling occurred. The research demonstrates that the telling of stories is central to the sense making processes used by senior marketing staff as they go about making key marketing decisions. Previous research into marketing planning, much of it based on the rational technical paradigm, has seriously neglected this important dimension of sense making in organisations. The narratives used by the marketing managers in this study appear to strongly influence the way they construct meaning and act in organisational settings. Based on these findings, an alternative approach to marketing planning is outlined, one which takes full account of the narrative story telling mode in the construction of strategy. The case is that marketing planning, both in scholarly and practical terms, has rarely been subjected to a narratological perspective. This paper attempts to help remedy the situation.

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The Problem of Marketing Planning and the Role of Stories in Organisations

This paper is based on the argument that the conventional marketing plan taps into a rationality that fails to capture the lived reality of people in organisations, where stories are central to the sense making process. For Hopkinson and Hogarth - Scott (2001), most of our understanding of the world is derived from the stories we hear or read. For Weick (1995), people use stories to understand action and meaning and are frames which help to guide conduct using individual's narrative powers. Watson (1994), points out that telling and listening to stories is basic to the human process of making judgements about the world. The stories we get involved with provide a language for how we talk about the world and hence how we act towards it. The contention here is that people think narratively in organisations, where they will tell stories about their experiences in order to make these

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experiences manageable. Wallemacq and Sims (1998), draw our attention to the argument that we remember entirely in stories and suggest that storytelling can be used to take on deliberate strategic and tactical purposes, a point also made by Johnson and Scholes (2002). Brown (2001) notes how the advent of post modern perspectives has assisted in shifting storytelling from the margins of study to the centre ground. He points out that the two areas are seen as virtually inseparable, noting that the post modern intellectuals role seems to be one of mainly telling stories.

This paper reports on some research that suggests the narrative form should be harnessed in the service of marketing planning, in order to better facilitate effective organisational action. A suggested narrative framework is then outlined. This is an area largely ignored by marketing academics. As Brown (2001 p119) points out, "Somewhat surprisingly marketing plans have never been examined from a narratological perspective." With a few exceptions, for example the work of Hopkinson (2003), the empirical study of marketing management neglects the importance of stories. This is not too say that the same occurs elsewhere in organisational studies. The narrative form has been applied to consumer research (Shankar et al 2001; Brown 1998). A number of studies of organisational behaviour (Gold 1996; Morgan and Dennehy 1997; Gabriel 1998) all pay considerable attention to the role of stories in organisational research. Skoldberg (1994) shows how a major change programme in Swedish government was interpreted by those involved as a narrative drama. Some reorganisations were categorised and explained as adventures, symbolised by stories of staff as tight rope walkers.

this paper here adopts a social constructionist approach to the story, where attention is placed on the creation of organisational reality through the narratives of actors (Hopkinson and Hogarth 2001). In this way, the story becomes a way to interpret experience. It is argued that the storytelling accounts below provide valuable insights into how decisions are actually made and implemented by marketers, an area that O'Driscoll and Murray (1998) indicate is one largely ignored by those researching into marketing. Despite the presence of copious amounts of textual material explaining how marketing should be done, the reality of marketing planning is often different. The sorts of problems associated with traditional marketing planning have been well documented (Dibb and Simkin 2000; Greenley et al 2004; Ashill et al 2003; Ardley 2005). A fundamental problem might be that the form the plan takes and its attendant processes, is one which fails to capture the way in which people commonly think in organisations. For O'Driscoll and Murray (1998), empirical reality strongly suggests that there is a need for explanations other than the rational- analytical. Taking this into account, it is possible to suggest that an alternative mode of representation should be generated when plans are being written and executed.

One problem with traditional planning as identified by Shaw et al (1998), is that most plans are couched in universalistic terms, where statements are made which could apply to any business, failing to focus on the specific contexts in which they operate. The close scrutiny of a range of typical marketing plans will show that they are often constituted by three key elements, these being terse fragmentary statements, bullet points and analytical tools (see McDonald 1995). In the interviews carried out for the research reported on in this paper, marketing managers were asked to

comment on the structure of their plans. The bullet point does appear as an omnipresent feature, indicated by the following quote. For the manager of a marketing services firm, the plan contains the following.

"Background, current situation, objectives, strategy, action plan and evaluation. Within the action plan, which tends to be several sheets, all of the different things being done are bullet pointed, with a timescale and budget."

What is not captured here is the complexity or richness inherent in an organisations activity. People do not think in bullet points, but in a mode that is largely narrative in nature (Sims 1999). In conventional plans, strategy is either presented in general abstract terms so as to be meaningless, or is presented in a highly prescriptive fashion which assumes an unproblematic predetermination to action and meaning. It is perhaps not surprising that traditional marketing planning fails in organisations as a consequence of this, a point well documented by the many studies of Gordon Greenley. Among these are Greenley (1983;1988), and Greenley and Bayus (1993). This paper makes the argument that the marketing plan should itself be presented in the form of a story, the latter acting to create, sustain fashion and test meanings in an organisation. Importantly, good stories can be seen to contain a sequence of events and a definition of relationships. Why not present plans in this format as well?

The case is that despite the reluctance of marketing writers to get involved, there appears to be a growing view amongst business strategists that storytelling as a framework for analysis and implementing action, has great potential (Seely Brown et al., 2004). Mintzberg et al (1998), in advocating the learning school of strategy, indicate that past experience is the basis of future actions and the former is best recounted using descriptive stories and scenarios. Peterman (1999) tells the story of his firm's failure, using strands of experience that are turned into a plot with a clear outcome. In marketing, Piercy (2002), advocates the use of stories for strategic purposes and Brown (2001), points to the growing significance in management studies of storytelling generally. Shaw et al., (1998), recount their successful experiences of using stories to drive strategy at the 3M organisation. Stories they feel are central to an individual's identity, and are important ways to form ideas. Significantly, Shaw et al (1998) pose the searching question as to why storytelling is usually discarded when plans are drawn up.

Stories and the Research Approach

A study of twenty four senior marketing managers was undertaken, representing a diverse range of business organisations. The methodology adopted was the in depth phenomenological interview. Each manager was questioned regarding the process and outcomes of marketing planning, used in their respective organisation. The resultant tapes were transcribed and subjected to the process of meaning condensation as advocated by Moustakas (1994). In all situations, respondents, their companies and other organisations they refer to, have been made anonymous. The case is that the research did not begin with the intention of searching for stories, but for

the socially constructed metaphors marketing managers used to explain their actions (Ardley 2005). It was only later, when re-examining the transcripts that the prevalence of stories appeared as an area worth some further analysis. As Watson (1995p13) points out, there is an important lesson here about the transcription of interviews.

".... another voice reminded me...if you have got the energy and time strive to transcribe everything...you never know what might seem significant until you have reflected on it later."

This return to the research transcripts revealed fully fledged stories and also what Gabriel (2000) describes as proto stories, ones which entail the seed of a story, being fragmentary narratives. In the research, stories, proto stories and the use of an intelligent reflective language were all pervasive. The presence of these swept aside other more rational technical sense making devices. An illustration of this subjective terminology, devoid of the traditional marketing rhetoric about decision making tools, market research indices, the four Ps and positioning, is provided by the marketing manager of a major financial services company. He is talking about the challenges of changing customer demands. His language and type of response is fairly typical of most interviewees.

"We are consumers in the world as well. I think-quite often in business we forget that outside of those walls we are consumers and what motivates us? What are we doing in our lives? What is impacting? We just have to free that up in our business thinking."

In terms of general findings, results clearly show that marketing managers do not think or appear to act through the medium of bullet points, or analytical tools, which is the form in which many marketing plans appear. In all cases here, as indicated in the above quote, when managers spoke, there was an intense qualitiveness present. In reflecting on this point, one of the managers, responsible for marketing at a business to business services company, commented that....

"People think narratively, we do not think in bullet points...what bullet points lack are the broader explanations which people need...in terms of my staff having to implement plans, people will say 'I worked for so and so and this is how we did it, can we do something like that here'. People rarely say we must achieve this or that ratio or percentage rate, but people will tell each other stories about retention rates instead."

An example of a typical story uncovered by the research follows. It illustrates clearly the ways in which the managers in this study resorted to a story telling format in order to explain meaning and action. The financial services marketing manager below, rather than presenting a technical rational explanation of why product decisions are central to the strategic planning process, used a story to make his point. He is the narrator of the tale and also a central character.

"As the product design guy, the most fundamental element of any company is the product, that is marketing. I remember going to a marketing conference, well it was actually a marketing awards dinner. It was in a great room in a hotel on Park Lane, we are all in black ties. I can't remember the chaps name now, which is embarrassing because he is quite a famous marketer. At one point he said, marketing is about products as much as it is about advertising and PR. Everyone here, put up your hand if you are involved in product design and I put my hand up, and only two other people. So he said, I will assume the rest of you are either in advertising or PR, the high profile areas, and there was about 700 people in the room."

The marketing director of a leading UK publishing company tells the story of the time he asked one of his product managers to carry out some additional market research in the street, in order to ensure that the product would be readily recognised by consumers. This type of story may not be directly about the development of a strategy, but is about communicating the right message and the importance of research. It is a story easily recalled, and could work to inform the thinking of employees in marketing. Boje (1994) notes that storytelling is about a communal dynamic that can order organisational learning. The story below can be viewed in this context. As Sims (1999) notes, narratives can help individuals to remember things that are important.

"One of our product marketing managers joined from a consumer background and on the day I sent her round with a clip board to go and check with forty students as they came out of the art college what they thought of the front cover of the new driving manual, which rather surprised her, but I think it was just to reinforce the point that we had done all sorts of research and the figures all look great but at the end of the day, I really wanted the people on the street to say yes, I understand what this book is about, it is a driving manual."

These stories along with many others, suggests that much marketing understanding is qualitative in nature, an argument that Hackley (1998; 2001) also makes. The managers interviewed in the study use an intelligent lay terminology which shapes the way they behave. It is these discursive processes which construct reality, processes which in the case of this research, appear to exist outside of the 'myopia and inflexibility' present in the language used by the marketing academy (Brownlie and Saren 2004 p2). Whilst only one manager in the study actively reconstructed their marketing plan as a story, the latter approach could be considered to be a feasible proposition for many more, given the pervasiveness of narratives in their discourse. There is no reason why the plan itself should not reflect manager's everyday language. As Wensley (1998) points out, stories represent one of the ways in which knowledge can be transferred. It is suggested that this transference can occur through a narratively structured plan and also through the stories managers tell to assist in the implementation of that marketing plan.

Managers and the Strategic Stories they Tell

Story telling which adopts a social constructionist approach usually implies a narrative in which events and their interpretation are connected causally with each other (Wallemacq and Sims 1998). The narrative research approach generates knowledge regarding the individual's construction of reality through storytelling and can be differentiated from other approaches (Hopkinson and Hogarth - Scott 2001). The latter identify stories as reports and myths as well. The story as a report views the world as objectively verifiable with the emphasis on facts, excluding the storytellers own explanations. The story as a myth highlights the collective nature of things where there is a shared aspect to the recounting process (Hopkinson and Hogarth (2001). The narrative approach can be seen in the examples of three stories which have been taken from the research on marketing planning. For Gabriel (2000), stories generally fall into one of four distinct modes poetic, comic, tragic, epic or romantic. The three stories recounted below can be regarded as falling within the epic variety, where achievement and success is the basis of the narrative. Other elements which can be said to exist in this mode are pride and admiration which are also present below. These types of stories as Gabriel (2000) points out can help generate commitment, a sense of duty and a strategic direction in organisations. They could also be used as way to set out a specific Bourse of action; in other words they could be used as part of a written plan. The first story is recounted by the marketing director of a printing company and is concerned with how his organisation went about achieving competitive advantage in the market place.

"...one of our main competitors was bought recently, I don't know if you saw the piece in the press, XYZ, which is a big printer, has been bought by a Middle Eastern Investment operation. Part of that buy was to also buy a company called Biggprint... which is a big magazine printer and other quality work as well. XYZ, when we did our research, it confirmed our suspicions that they are not highly regarded for service and quality...we realised very quickly of course the people who liked trading with Biggprint would now be somewhat apprehensive, so we specifically targeted those customers, through some resourcing effort at those customers, and I am glad to say, we have just won a half million pounds account as a result of that activity..."

The next story can also be regarded as being an epic one as well. In this instance, the marketing manager of a building contract company tells the story of how her firm won the admiration of a customer. It emphasises the importance of customer service, and relationships, another area often neglected in the construction of traditional marketing plans (Gummesson 1993).

"We had an instance recently in Newton Bluff, some social housing, handicapped residents, in bungalows, the oven doors, they wanted pull down ones. But the housing association hadn't realised and they had

specified side open and we had just done as we were told. And we had so much grief from this gentleman, but I mean to him it was a very valid point, but I don't know how many times we heard from him and to start with all he did was rant and rave, but I mean we really did try so hard to try and get the problem resolved, but the actual manufacturers of the ovens, I think it was Muff, just did not do them, but even so, I spent hours on the phone to this gentleman. The first time he had rung up the housing association managing director, he had complained that Samson's can't do the ovens, Samson's can't do this, Samson's can't do that, but by the end of the whole scenario, he was ringing up and saying well, Samson's weren't able to do anything but they listened to me, I know I went on and ranted and raved, but they were all very, very good, nobody was rude and nobody was unkind, they all did their best to help."

Finally, there is a story provided by the marketing manager of a large financial services company. His story indicates the strategic intent of his current company and also highlights what he perceives to be the problems with a major competitor he used to work with. His story suggests possible product and communication strategy decisions, which could be built into a narrative style marketing plan. The story he presents also encompasses the issue of marketing's social responsibility to consumers.

"I spent eleven years at the Big Finance Company, designing increasingly complicated products that brokers wanted to sell, because they[^]were complicated enough for consumers not to understand what they were being charged and to justify their own charge, when it was seen in terms of the advice required. When I came here, all that was removed in one fell swoop. I can remember all of that consumer research I have sat through and I can say ok , now, lets look at a pension product, it is a long term savings plan with some pretty big tax incentives. It doesn't need to be any more complicated than that."

Strategic Stories and the Marketing Plan

If people think in a storytelling format, then it seems appropriate to suggest that marketing plans could correspond to the logic of that approach. A new style marketing plan might mean that major problems of implementation, of the type identified by Noble and Mokva (1999), could well be overcome. If attempts at mechanistic implementation often fail (Ashill et al 2003), then this might mean a change of direction is required in terms of the plans format and its delivery. If people do not think in rational technical ways why should the marketing plan be written and expected to be executed in this format? It was argued by the business services marketing manager mentioned earlier, that employees are likely to engage with the altered structure in a way that is not the case with the traditional marketing plan. She went on to develop this point.

"Because it is written in everyday language the technical ambiguity of the traditional plan is avoided. It is a more interesting style that people can engage with. It can clearly explain what needs to be done and through little stories, give examples of how to do it. People can then think of their own ideas to do things. Yes the narrative style facilitates engagement. Conventional plans are too broad and abstract."

This means then it is feasible to suggest that a reconstruction of the traditional marketing plan could be undertaken. Each of the areas of the 'strategic marketing story' could relate to the typical structure of a narrative. To further illustrate this style of plan, an example is drawn from the research, where one company UTS UK, had its marketing strategy formulated as a narrative. The narrative format for the plan was worked on briefly with the marketing director, where it was envisaged that each of the following stages could replace the traditional approach and be a guide to action for employees. To some extent the approach here was influenced by the work of Shaw et al (1998p7) and their work with a 3M divisional manager, who also used a narrative style plan. In constructing the latter, the manager gives us an insight into his thinking. "I said to myself, I'm going to write this like a book- make it - like a story so that anybody can pick up the plan, read it, and understand our situation." This represents an alternative form of language and discourse to the rational technical paradigm. Arguably this is a style more reflective of the actual rhetorical devices that are used by individuals in work based communities, where the narrative form shows how events are sensible and fit within shared cultural spheres (Boland and Tenkasi 1995). It is suggested that the narrative mode can work at each stage outlined below, although what is presented here is schematic and condensed.

The Preface introduces the plot. This could serve as an introduction to the main story. The names of the main players could be included here and previous stories which ended in success for the firm. As an example, some background information could be provided about the organisation in question. In this case the company is Leighton Jay Technical Services which was started in 1979 by Melvin Roe, who used to be an engineering lecturer at Newfoundland College. We have now evolved into an international company and by 1984, we had a subsidiary in the USA. Since 1984, we have grown and grown. We sell electronic, computer based educational products right through the age ranges, from Pre School to adult. In this section of the plan the amount of detail could of course vary, its main purpose being to familiarise new employees with the company story and to remind more established staff of its development.

Next is the Backdrop, reminiscent of a play which sets the broad scene. Here the current broad situation can be defined with a narrative about the business environment. In relation to Leighton Jay, this could include something like the following. Things have changed in colleges since incorporation. Before incorporation, every one had a set budget; they knew how much their budget was every year. We just had to convince colleges to allocate a certain percentage of that budget to our products every year. The story is different now. Currently, there are ranges of ways in which colleges can access funds, by putting in structured bids for funds for particular pots of money. We need to access and build relationships with people who are

involved in this type of activity, who work in colleges and those who provide the funds. We must find out what the priority areas are.

Then there is the Confrontation, which details the main characters and situations of the story. It needs to deal with the specific challenges facing organisational members. For Leighton Jay, lots of sales in education are made on a referral basis, so establishing and maintaining relationships are very important indeed. Product lines are changing rapidly as examining boards can drop particular curriculum areas and we need to be aware of this. It is important that we continuously monitor current problems and perceived problems related to learning in colleges and develop solutions to those problems. We have to keep talking to tutors, learners and educational managers. The monitoring of the governments new initiatives must be carried out in relation to information technology developments.

What follows is the Settlement, which is the working through of the story, the main plot, which is about the winning of a struggle. Here, the narrative should indicate how obstacles will be overcome and how various marketing methods could be deployed to resolve this. Leighton Jay aim is to go for £3million worth of sales in the UK for the coming two years, with a new product. Development costs are targeted at £150,000. The payback time is two years. The product is provisionally titled 'Within Technology' and will be used in electrical engineering workshops in FE colleges. Currently we are unaware of any competitors developing this product, but if they do we will respond at the time. This could mean more intense sales drives and marketing support. Generally the sales and marketing strategy will be to continue to sell in the UK FE market through our direct sales force. They will be supported by discrete advertising through targeted mail shots. Specifically, we intend firstly to establish three pilot clients. We will part fund those pilots, in order to get them into the college market. We will also get the support of local training councils in the areas of the college to support our initiative. We will use the information from these pilots in order to produce case histories which we can use for marketing purposes. This information can be provided by personal calls and mailings. The market will have lots of questions that we must be ready to answer. We are looking at about a ten month time span here.

Finally there is the Epilogue, which updates us on new events in the story. This could present a continuous monitoring process explaining what is happening. Importantly, it could be used as a flexible way to indicate changes of direction or new developments that might need to be taken account of. The epilogue could contain something similar to the following for Leighton Jay Technical Services. Three months into the programme and we have established successfully two of the three pilot groups. A series of targeted communications have got out to other colleges and sales people have reported good levels of interest. Our web site has reported increased traffic levels.

The narrative structure of this storied style marketing plan is reflective of a social obstructionist approach (Hopkinson and Hogarth Scott 2001). While it is usually recognised that stories have a beginning, middle and end, within that structure the story teller can fashion a tale in whatever format they want, so long as a story is told. Importantly, the narrative style allows a full account to be taken of local context and managers can construct their stories to reflect the realities of their own marketing situations. As Brown (2001) points out, it

seems barely credible that the proponents of traditional marketing planning should attempt to decant every plan into the same mechanistic cast. The novel is the epitome of a story, which is an act of individual creation, drawing on subjective realities and as a consequence, there is no reason why marketing plans cannot be constructed and lived in this fashion as well.

Conclusion: Narrating the Future: Towards a Storytelling Turn in Marketing Planning

Hopkinson and Hogarth (2001), point out that the social construction of reality through the narrative form has been neglected in a very significant way in marketing journals. This paper presents an attempt to redress the balance. This approach outlined here is a nascent one however, clearly requiring further work. Whilst one company in the study provided some outline ideas on how a possible narrative form of marketing plan might appear, a working model needs to be developed, implemented and evaluated. Despite this, a convincing argument exists for the integration of stories and plans. Shaw et al (1998), point out that we slowly acquire the ability to formulate plans through the various stories we hear in childhood. From these, children learn to picture a course of action, think about its effects on other people and then decide whether or not to do it. This suggests that the storytelling mode is far more pervasive than perhaps is commonly recognised. -For example, thought experiments are an established form of scientific reasoning, where the scientist imagines a sequence of events and then develops a narrative to communicate this to others. We do not normally think of the scientist doing their work in a narrative mode. Boland and Tenkasi (1995), point out that Einstein is thought to have used these thought experiments based on stories about travelling on light beams and in elevators. The scope of narrative appears limitless, a point made by Hardy (1968p5).

"We dream in narrative, daydream in narrative, remember, anticipate, hope, despair, believe doubt, plan, revise, criticise, construct, gossip, learn, hate and love by narrative."

Through the language and rhetoric we use, reality gets constructed and it seems clear that story telling and planning are connected. By reconstructing the marketing plan into a sequential narrative, it frames situations that can then be worked out as action in organisational contexts. Brown (2001) suggests that the future for marketing plans rests on something else apart from rationality, rigour, numbers and computers. He argues that it depends on good storytellers who are capable of communicating a convincing message to all stakeholders in an organisation. Narratives, Brown argues, need to be adequately imaginative in order to persuade the reader to accept the author's view of the future. It has been argued here in this paper that the traditional rational technical marketing plan fails to do this. What is not captured is the process of individual sense making in organisations, as the traditional marketing plan is based on notions of the systemically determined actor. In this schema, the individual appears devoid of any social or organisational narrative of their own. This perspective negates the individual's life world, central to which is the constant telling and retelling of stories. People in organisations are

habitual storytellers and marketing needs to take account of this. As shown by the marketing managers in this study, stories represent not only a process which helps us to construct our social world and to make meaning, but one which can also instigate and drive forward courses of action.

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