

Marketing Plan Outline

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As you read in Chapter 2, there is more than one correct format for a marketing plan.

Many organizations have their own distinctive format or terminology for creating a marketing plan, and every marketing plan should be unique to the firm for which it was created. The format and order of presentation, therefore, must be flexible.

This appendix presents only one way to organize a marketing plan. The outline is meant to give you a more detailed look at what you need to include, topics you need to cover, and the types of questions you must answer in any marketing plan. But, depending on the product or service for which you are drafting a plan, this set of questions may only be the starting point for more industry-specific issues you need to address.

An actual marketing plan from e-motion software follows this outline. The e-motion marketing plan includes annotations that tie each part of the plan to the material throughout the book. You'll see the correlation between chapter concepts and the elements of a professional marketing plan for a real company.

If you are assigned a marketing plan as a course requirement, this appendix can help you organize your work. In addition, worksheets that guide you through the process of marketing planning are available on your textbook's companion site. The worksheets can be completed electronically or printed out and filled in by hand.

I BUSINESS MISSION

- What is the mission of the firm? What business is it in? How well is its mission understood throughout the organization? Five years from now, what business does it wish to be in?
- Does the firm define its business in terms of benefits its customers want rather than in terms of goods and services?

II SITUATION ANALYSIS (SWOT ANALYSIS)

- Has one or more competitive advantages been identified in the SWOT analysis?
- Are these advantages sustainable against the competition?

A. Internal Strengths and Weaknesses

- What is the history of the firm, including sales, profits, and organizational philosophies?
- What is the nature of the firm and its current situation?
- What are the firm's resources (financial, human, time, experience, asset, skill)?

- What policies inhibit the achievement of the firm's objectives with respect to organization, resource allocation, operations, hiring, training, and so on?

B. External Opportunities and Threats

- *Social*: What major social and lifestyle trends will have an impact on the firm? What action has the firm been taking in response to these trends?
- *Demographics*: What impact will forecasted trends in the size, age, profile, and distribution of population have on the firm? How will the changing nature of the family, the increasing importance of technology in both professional and personal use, and changes in the ethnic composition of the population affect the firm? What action has the firm taken in response to these developments and trends? Has the firm reevaluated its traditional products and expanded the range of specialized offerings to respond to these changes?
- *Economic*: What major trends in taxation and income sources will have an impact on the firm? What action has the firm taken in response to these trends?
- *Political, Legal, and Financial*: What laws are now being proposed at international, federal, state, and local levels that could affect marketing strategy and tactics? What recent changes in regulations and court decisions affect the firm? What political changes are taking place at each government level? What action has the firm taken in response to these legal and political changes?
- *Competition*: Which organizations are competing with the firm directly by offering a similar product? Which organizations are competing with the firm

indirectly by securing its prime prospects' time, money, energy, or commitment? What new competitive trends seem likely to emerge? How effective is the competition? What benefits do competitors offer that the firm does not? Is it appropriate for the firm to compete?

- *Technological*: What major technological changes are occurring that affect the firm?
- *Ecological*: What is the outlook for the cost and availability of natural resources and energy needed by the firm? Are the firm's products, services, and operations environmentally friendly?

III OBJECTIVES

- Is the firm's mission statement able to be translated into operational terms regarding the firm's objectives?
- What are the stated objectives of the organization? Are they formally written down? Do they lead logically to clearly stated marketing objectives? Are objectives based on sales, profits, or customers?
- Are the organization's marketing objectives stated in hierarchical order? Are they specific so that progress toward achievement can be measured? Are the objectives reasonable in light of the organization's resources? Are the objectives ambiguous? Do the objectives specify a time frame?
- Is the firm's main objective to maximize customer satisfaction or to get as many customers as possible?

IV MARKETING STRATEGY

A. Target Market Strategy

- Are the members of each market homogeneous or heterogeneous with respect to geographic, sociodemographic, and behavioral characteristics?
- What are the size, growth rate, and national and regional trends in each of the organization's market segments?
- Is the size of each market segment sufficiently large or important to warrant a unique marketing mix?
- Are market segments measurable and accessible to distribution and communication efforts?
- Which are the high- or low-opportunity segments?
- What are the evolving needs and satisfactions being sought by target markets?
- What benefits does the organization offer to each segment? How do these benefits compare with benefits offered by competitors?
- Is the firm positioning itself with a unique product? Is the product needed?
- How much of the firm's business is repeat versus new business? What percentage of the public can be classified as nonusers, light users, or heavy users?
- How do current target markets rate the firm and its competitors with respect to reputation, quality, and price? What is the firm's image with the specific market segments it seeks to serve?
- Does the firm try to direct its products only to specific groups of people or to everybody?
- Who buys the firm's products? How does a potential customer find out about the organization? When and how does a person become a customer?
- What are the major objections given by potential customers as to why they do not

buy the firm's products?

- How do customers find out about and decide to purchase the product? When and where?
- Should the firm seek to expand, contract, or change the emphasis of its selected target markets? If so, in which target markets, and how vigorously?
- Could the firm more usefully withdraw from some areas where there are alternative suppliers and use its resources to serve new, unserved customer groups?
- What publics other than target markets (financial, media, government, citizen, local, general, and internal) represent opportunities or problems for the firm?

B. Marketing Mix

- Does the firm seek to achieve its objective chiefly through coordinated use of marketing activities (product, place, promotion, and pricing) or only through intensive promotion?
- Are the objectives and roles of each element of the marketing mix clearly specified?

1. Product

- What are the major product/service offerings of the firm? Do they complement each other, or is there unnecessary duplication?
- What are the features and benefits of each product offering?
- Where are the firm and each major product in the life cycle?
- What are the pressures among various target markets to increase or decrease the range and quality of products?

- What are the major weaknesses in each product area? What are the major complaints? What goes wrong most often?
- Is the product name easy to pronounce? Spell? Recall? Is it descriptive, and does it communicate the benefits the product offers? Does the name distinguish the firm or product from all others?
- What warranties are offered with the product? Are there other ways to guarantee customer satisfaction?
- Does the product offer good customer value?
- How is customer service handled? How is service quality assessed?

2. Place/Distribution

- Should the firm try to deliver its offerings directly to customers, or can it better deliver selected offerings by involving other organizations? What channel(s) should be used in distributing product offerings?
- What physical distribution facilities should be used? Where should they be located? What should be their major characteristics?
- Are members of the target market willing and able to travel some distance to buy the product?
- How good is access to facilities? Can access be improved? Which facilities need priority attention in these areas?
- How are facility locations chosen? Is the site accessible to the target markets? Is it visible to the target markets?
- What are the location and atmosphere of retail establishments? Do these retailers satisfy customers?

- When are products made available to users (season of year, day of week, time of day)? Are these times most appropriate?

3. Promotion

- How does a typical customer find out about the firm's products?
- Does the message the firm delivers gain the attention of the intended target audience? Does it address the wants and needs of the target market, and does it suggest benefits or a means for satisfying these wants? Is the message appropriately positioned?
- Does the promotion effort effectively inform, persuade, educate, and remind customers about the firm's products?
- Does the firm establish budgets and measure effectiveness of promotional efforts?

a. Advertising

- Which media are currently being used? Has the firm chosen the types of media that will best reach its target markets?
- Are the types of media used the most cost-effective, and do they contribute positively to the firm's image?
- Are the dates and times the ads will appear the most appropriate? Has the firm prepared several versions of its advertisements?
- Does the organization use an outside advertising agency? What functions does the ad agency perform for the organization?
- What system is used to handle consumer inquiries resulting from advertising and promotions? What follow-up is done?

b. Public Relations

- Is there a well-conceived public relations and publicity program? Does the program have the ability to respond to bad publicity?
- How is public relations normally handled by the firm? By whom? Have those responsible nurtured working relationships with media outlets?
- Is the firm using all available public relations avenues? Is an effort made to understand each of the publicity outlet's needs and to provide each with story types that will appeal to its audience in readily usable forms?
- What does the annual report say about the firm and its products? Who is being effectively reached by this vehicle? Does the benefit of the publication justify the cost?

c. Personal Selling

- How much of a typical salesperson's time is spent soliciting new customers as compared to serving existing customers?
- How does the sales force determine which prospect will be called on and by whom? How is the frequency of contacts determined?
- How is the sales force compensated? Are there incentives for encouraging more business?
- How is the sales force organized and managed?
- Has the sales force prepared an approach tailored to each prospect?
- Has the firm matched sales personnel with the target market?

characteristics?

- Is there appropriate follow-up to the initial personal selling effort? Are customers made to feel appreciated?
- Can database or direct marketing be used to replace or supplement the sales force?

d. Sales Promotion

- What is the specific purpose of each sales promotion activity? Why is it offered? What does it try to achieve?
- What categories of sales promotion are being used? Is sales promotion directed to the trade, the final consumer, or both?
- Is the effort directed at all the firm's key publics or restricted to only potential customers?

4. Price

- What levels of pricing and specific prices should be used?
- What mechanisms does the firm have to ensure that the prices charged are acceptable to customers?
- How price sensitive are customers?
- If a price change is put into effect, how will the number of customers change? Will total revenue increase or decrease?
- Which method is used for establishing a price: going rate, demand oriented, or cost based?
- What discounts are offered, and with what rationale?
- Has the firm considered the psychological dimensions of price?

- Have price increases kept pace with cost increases, inflation, or competitive levels?
- How are price promotions used?
- Do interested prospects have opportunities to sample products at an introductory price?
- What methods of payment are accepted? Is it in the firm's best interest to use these various payment methods?

V IMPLEMENTATION, EVALUATION, AND CONTROL

- Is the marketing organization structured appropriately to implement the marketing plan?
- What specific activities must take place? Who is responsible for these activities?
- What is the implementation timetable?
- What other marketing research is necessary?
- What will be the financial impact of this plan on a one-year projected income statement? How does projected income compare with expected revenue if the plan is not implemented?
- What are the performance standards?
- What monitoring procedures (audits) will take place and when?
- Does the firm seem to be trying to do too much or not enough?
- Are the core marketing strategies for achieving objectives sound? Are the objectives being met, and are the objectives appropriate?
- Are enough resources (or too many resources) budgeted to accomplish the marketing objectives?

The E-Motion Software Marketing Plan

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VII SUMMARY

I COMPANY DESCRIPTION

Scott Keohane and a partner founded e-motion software in 2003 and established its worldwide headquarters in Austin, Texas. They envisioned software solutions that conformed to a particular business, not the other way around, with products designed to (1) improve operating efficiency, (2) empower users, (3) enhance security, (4) improve ROI, and (5) streamline business processes. [Chapter 1: Market Orientation—focusing upon customer needs and integrating all activities to readily provide customer satisfaction, while achieving long-term company goals.] Ultimately, however, Keohane's partner did not want to remain with the company. Keohane converted the partner's shares into a note, according to the partnership agreement the two had in place.

The origins of the company were based in Keohane's 10 years of entrepreneurial endeavors, with 4 years of this time spent as an independent consultant in the Oracle applications marketplace. Oracle is the world's largest enterprise software company. According to Oracle's Web site, the company's business is information—how to manage it, use it, share it, and protect it. Commercial enterprise information management software systems, such as those offered by Oracle, promised seamless integration of all information flowing through a company.

In a global marketplace in which external company collaborations are driving business

efforts and internal cross-functional integration is critical for timely decision making, enterprise systems could help position companies in a highly competitive environment. [Chapter 7: Business Marketing—E-motion software operates as a business marketer since it provides good and services to organizations for purposes other than personal consumption.] Enterprise systems, such as the Oracle E-Business Suite, provided a simplified, unifying corporate technology platform. This type of platform enabled companies to utilize high-quality internal and external information both strategically and tactically. There were numerous product families in the E-Business Suite (e.g., advanced procurement, contracts, performance management, customer data/relationship management, financial, human resource management, logistics, manufacturing, marketing, order management, projects, sales, service, and supply chain management). [Chapter 10: E-Business is one product line in Oracle's product mix width. There are numerous product items in this product line.]

As an independent consultant, Keohane was continually asked to customize existing Oracle technology or create one-off applications to meet common requirements. The need for third-party products that would withstand upgrades to the underlying Oracle architecture was identified and e-motion software was formed. The overall business concept was to utilize the Oracle E-Business Suite as the underlying framework for customization to fit a particular customer's needs. Soon after incorporation, e-motion software became a member of the Oracle Partner Network. By joining the Oracle Partner Network, e-motion software gained access to Oracle Software Licenses, technical training, marketing funds, and co-marketing opportunities. [Chapter 7: Strategic Partnership—E-motion software partnered with Oracle so as to improve the offerings to

its customers.]

II BUSINESS MISSION [Chapter 2: The foundation of any marketing plan is the firm's mission statement.]

E-motion software is committed to the Oracle E-Business Suite of Applications and will provide a level of support that is unmatched in the industry. The company's goals are to make Oracle Applications more reliable, to enhance the Applications' functionality, and to make the Suite's use more efficient. [Ch. 2: What business is e-motion software in?]

The company's products offer an attractive alternative to in-house development and support. E-motion software customers will be utilizing functional products that are self-funding. That is, the savings achieved through a more efficient workforce and security enhances will far exceed the cost of the company's products. The company's commitment extends from the methods used to build e-motion software products to the company's simple installation procedures to the post-installation service. E-motion software products run on multiple server platforms, require no customization, and are fully compatible with existing hardware and software warranties. [Chapter 2: E-motion software is focused on markets served and benefits sought by its customers.]

III SITUATION ANALYSIS [Chapter 2: Marketers must understand the current and potential environment before defining marketing tactics.]

Industry Analysis [Chapter 2: Environmental scanning is the collection and interpretation of information about forces, events, and relationships in the external environment that may affect the future of the organization or the implementation of the marketing plan.]

Trends. The Enterprise Resource Planning (ERP) community has undergone a radical

change since the turn of the century. Historically, applications were designed for the professional user or technology expert. Today's marketplace, however, has shifted from the professional user to employee users. That is, employees in all functional areas have access to and utilize information from the ERP application. Thus, ERP providers have shifted to developing applications intended for individual employee use instead of releasing bigger applications designed for the professional user. These self-service, employee based applications have fundamentally changed the way ERP applications are sold, implemented, and administered. Professional users are no longer the keepers of the data, manually entering and updating data from forms and memos. They have now become administrators in charge of ensuring data integrity. The promise of turning departments, such as HR and benefits, from manual intensive data entry shops to proactive reporting shops has shifted the marketplace to self-service suite applications. This emerging trend has prompted the development of self-service applications that enable employees to utilize systems within their individual realms of expertise, yet systems that are integrated across the firm.

Competitors. E-motion software represents a new voice within the Oracle community. The company is creating a new niche in the marketplace and, as such, competition comes from a variety of sources. There are currently no head-to-head competitors. Competition can be split into three very distinct groups: Oracle, consulting firms, and in-house development centers.

Apart from being the company that created the ERP industry, *Oracle* has resources that dwarf every other company in the ERP marketplace. The availability of capital and the size of the development group infer that Oracle can simply reallocate a small

development team to work on competing products. Oracle has, however, repeatedly released products that were little more than advanced betas, resulting in weeks of downtime for companies implementing the new products. By building applications that require no customization to Oracle code, e-motion software can confidently assure its customers that its products will work.

Consulting firms could advise the client to include the cost of custom application development into the total cost of the consulting engagement. This is standard protocol for competing consultancies and would effectively stop e-motion software from entering into a client site. Most consultancies, however, do not have a support and development center to handle ongoing system management. E-motion software will compete directly with consultancies by providing superior service at an affordable price.

The *In-House Development Center* (IHDC) poses a tricky problem for e-motion software. If a company has an IHDC, it is usually a trusted source that knows the company, its standards, and its software. Additionally, the IHDC is usually considered a “no-cost” center since salaries are already included in the company’s budget. Thus, program development and implementation is considered just another project with no additional cost. On the positive side, information technology (IT) budgets were slashed and IT departments scaled down over the past few years. While IT spending has begun to trend upward again, the creation of IHDC units has lagged this spending trend. E-motion software plans to capitalize on this lag in IHDC unit development and upward spending trend.

Customer Profile. The marketplace has moved from professional users to employee users. Basically, professional users are now babysitters, ensuring that employees do not

enter incorrect information into the system. This poses quite a quandary. Professional users must maintain the integrity of the system, while releasing control of it at the same time. This often forces the professional user to become a reactive unit, rushing to fix things when they break down. Employee users do not generally know the idiosyncrasies of the ERP system, of which there are many. Thus to maintain system integrity and ensure data reliability, professional users are often double-checking employee's data entry and also answering help desk calls regarding how to use the system. This is not, however, what a self-service ERP solution is designed to deliver. E-motion software proposes to enter the self-service arena with a broad range of products designed to regain the efficiencies promised by self-service applications.

Technology. The costs of developing and maintaining an ERP solution require that the underlying technology be relevant for several years after product purchase and installation. The rapid emergence of Internet-based transactions (e.g., banking, loan applications, etc.) brought self-service applications to the forefront of business opportunity. Initially, Oracle attempted to use a mix of PL/SQL and DHTML code in the self-service offerings. This mix, however, did not provide the best-looking applications, had little functionality, and were difficult to implement. Oracle then switched to using Java Server Pages (JSP) as its self-service foundation, with PL/SQL and HTML as the accessory languages. Products with the JSP foundation were well received in the marketplace. E-motion software plans to adhere to Oracle's decision to use JSP, especially since JSP offers e-motion software some key benefits: (1) JSP is robust and flexible allowing all applications to use the same coding techniques, (2) JSP is recyclable which means that e-motion software can leverage existing code across new applications,

(3) JSP is accessible since Java is one of the most well known programming languages, (4) JSP is portable, allowing e-motion software to easily enter other ERP markets, and (5) the use of JSP means that e-motion software will always comply with Oracle approved practices.

SWOT Analysis

The strengths, weaknesses, opportunities, and threats (SWOT) analysis provides a snapshot of e-motion software's internal strengths and weaknesses and external opportunities and threats. [Chapter 2: Performing a SWOT analysis allows firms to identify their competitive advantage.]

Strengths. [Chapter 2: Strengths are *internal* to the firm.]

- Founder—Scott Keohane is not only extremely knowledgeable about the third-party marketplace, he is also personally and financially dedicated to making the business a success
- Active and committed advisory council
- Reliable products and product support
- Member of Oracle Partner Network

Weaknesses. [Chapter 2: Weaknesses are *internal* to the firm.]

- A one-person company that has to supplement the company with independent consulting services
- Not enough time dedicated to company development
- While considerable anecdotal information, the company is lacking in marketing research
- Financial resources

Opportunities. [Chapter 2: Opportunities are *external* to the firm.]

- Changing marketplace that coincides with e-motion software's product development
- The move toward employee users instead of professional users
- Growth market
- Technological changes
- Refocus on IT applications
- Persistent threat of security breaches
- Growing focus on cross-functional interactions in the business press
- New entries into the workforce (e.g., recent college graduates) are trained to use computers in decision making and thus expect companies to have data programs in place

Threats. [Chapter 2: Threats are *external* to the firm.]

- Competitors—all three groups of competitors likely have deeper pockets than e-motion software
- Offerings can be duplicated by knowledgeable experts
- Limited market access across the United States
- Economies of scale in larger companies such as Oracle
- IT departments do not have unlimited budgets

IV MARKETING OBJECTIVE

The marketing objective is to establish the company as an expert in the third-party marketplace. [Chapter 2: The marketing objective statement provides a look at what the company seeks to accomplish. It is consistent with the priorities of the organization.] The third party product market for functions that are specifically designed for integration with

Oracle Applications is in its infancy. E-motion software has to establish itself as a leader in this new marketplace. To accomplish this objective, customers must see that e-motion software products are safe and secure and that they do not affect existing Oracle functionality or their Oracle warranty.

Objective Metric: Three major Oracle clients by the end of 2005 [Chapter 2: Stated objectives must be measurable and time specific.]

To accomplish this marketing objective, e-motion software must obtain three major Oracle clients by the end of 2005. These clients will serve as reference sites for the company. These clients will enable e-motion software to demonstrate the gains achieved by using e-motion software products. As such, the clients need to be vocal and create viral marketing within the industry.

Objective Metric: One client in each region of the United States by the end of 2006 [Chapter 2: Stated objectives must be measurable and time specific.]

Given the close-knit nature of Oracle clients through organizations such as the Oracle Application User's Group (OAUG), e-motion software needs to gain clients within each of the major geographic areas in the United States: Northeast, Mid-Atlantic, Southeast, Midwest, Northwest, and West Coast.

V MARKETING STRATEGY

Target Market Strategy

E-motion software's sales plan is based on the company's understanding of the marketplace and on how it will resolve inefficiencies with the use of the Oracle E-Business Suite of Applications. From his consulting experience in helping potential clients install and maintain their individualized suite of applications, Keohane has

considerable understanding of users' needs. To obtain clients, e-motion software, will rely on continuing relationships with prospective clients, maintaining ongoing relationships with other consulting firms with an on-going relationship, and reaching new clients via marketing and sales initiatives.

Geographically, e-motion software will direct its marketing and sales efforts within the contiguous United States. [Chapter 8: Geographic segmentation refers to segmenting markets by region of a country or the world, market size, market density, or climate.] Though global operations are potential clients, the current size of e-motion software suggests that the U.S. marketplace is more viable at this time. [Chapter 8: Accessibility—the firm must be able to reach members of the targeted segment.] Within this marketplace, e-motion software will focus upon companies that have between 500 and 10,000 employees. These are the small- to mid-size companies that utilize the Oracle E-Business Suite of Applications. Companies of this size are unlikely to have their own development staffs in place or have the desire to develop and/or support home-grown applications. [Chapter 8: Responsiveness—the targeted market must respond to the marketing mix offered by the company.] Within these small- to mid-size companies, the individual target customer varies by the product offering. For example, a database administrator will be targeted for the company's system administrator products, and the IT director will be targeted for the functional line of product offerings.

Marketing Mix [Chapter 2: Marketing mix (the four Ps) refers to the unique blend of product, place (distribution), promotion, and pricing strategies.]

Product. [Chapter 7: E-motion software provides a business service to its customers.]

E-motion software develops applications specifically for the Oracle E-Business Suite.

For clients of Oracle Applications who desire greater efficiency and an increase in ROI on their installed ERP systems, e-motion software will offer a line of products designed specifically to improve performance of the existing Oracle Application installation.

Clients that have in-house development staff will be able to lower the total cost of ownership of a product by having e-motion software upgrade their Oracle installation.

[Chapter 7: The buying center includes all persons in an organization who become involved in the purchase decision. In-house development staff will play a critical role in the buying process.] Clients without in-house staff, however, are more likely to benefit from e-motion software installations because they will now be able to perform a greater number of tasks that are not offered by Oracle. [Chapter 7: In this instance, the members of the buying center are different than a company with an in-house development staff.]

As a product-based company, e-motion software cannot ignore the importance of product marketing. The three product attributes that will drive the business are level of service, usability, and clear return on purchase price. [Chapter 7: Quality, service, and price are important evaluative criteria in a purchase decision involving software products.] The reluctance of some customers to install relatively new third-party products into their ERP systems is an obstacle to overcome via product marketing. [Chapter 7: This is often a new buy for the customer.] The company has to deliver on the promise of the products—that promise being that “E-motion software products make the business process of our customers more efficient, while easily understanding the upgrades to the underlying Oracle Application.” E-motion must remain focused on this promise during both the product development and the product delivery process. [Chapter 7: Keeping current customers satisfied is just as important as attracting new ones.]

E-motion software's product line consists of functions that respond to inefficiencies identified from years of experience with Oracle ERP systems. Because the product portfolio is built expressly for the Oracle Applications E-Business Suite, the products are updated continually to maintain compatibility as well as to take advantage of new technologies and capabilities released by Oracle. [Chapter 10: Quality and functional modifications keep e-motion software's products up-to-date with ongoing technological changes.] All products enjoy the following characteristics: tight integration with Oracle, intuitive design, compatible architecture, and streamlined interfaces. Product offerings are iPraise, Responsibility Management, Password Reset, and Global Directory. [Chapter 10: E-motion software's product mix width is composed of one product—enterprise software. This product line is comprised of four product items.]

iPraise. [Chapter 10: iPraise is an individual brand.] The employee appraisal system developed by e-motion software is the most dynamic appraisal system available to Oracle customers. Combining e-motion software's commitment to streamlined application interfaces with the vast functionality available to Oracle E-Business Suite customers, iPraise represents the next generation of appraisal systems. The system is flexible, allowing it to be configured to meet the specific needs of the organization. Using the appraisal configuration engine, the customer can choose to include or omit several aspects of the appraisal process and even determine in which order they are to be constructed. Thus, iPraise is a complete solution for Oracle customers. Customers can opt to integrate other modules of Oracle that have been configured previously with the E-Business Suite. Installing iPraise is fast and easy.

Responsibility Management. [Chapter 10: Responsibility Management is an individual

brand.] Responsibility Management solves one of the most important questions faced by all Oracle system administrators: “Who has access to which data?” Using Responsibility Management, a system administrator or database administrator can quickly, easily, and accurately identify who has access to which data in real-time. Responsibility Management can inform the administrator of the following:

- Employees with particular responsibility
- Employees without a single responsibility
- User names that are not attached to any employee
- User names that are attached to more than one employee
- User accounts that are expiring in x number of days
- User accounts created in x days prior
- All users that have been given y responsibilities in x days prior

Results are displayed in a simple table that can be arranged and sorted. The table can also be exported to Excel for further investigation.

In addition to the query capabilities, Responsibility Management enables the system administrator to make changes to the user account, such as:

- End-date a responsibility
- User account expiration update for a particular responsibility
- Bulk assignment of responsibilities (by organization, job, location, etc.)
- Bulk end-dating of responsibilities (by organization, job, location, etc.)

Overall, Responsibility Management enables system administrators to enforce security policies by providing a simple, easy-to-use function to identify who has what responsibility. Each day that a person has access not identified with his or her position is

unnecessary and insecure.

Password Reset. [Chapter 10: Password Reset is an individual brand.] Forgotten passwords are the single largest end-user issue. Every day, help desks are bombarded with calls from end-users who have forgotten their passwords. The standard Oracle log-in link does not provide a solution for this problem; thus, end-users are forced to call the help desk to reset the password. E-motion software's Password Reset function is the solution.

Password Reset is modeled after the standard password reset functionality available on most Web sites. Even if the user is using Password Reset for the first time, all the components will seem familiar and the user will know where to go next without receiving complex instructions or training. Password Reset functions as a part of the Oracle Applications. There are not outside Web sites to access or other applications to open. The user simply clicks on a link from the login page, enters the required information, and the password is reset. The user can then login immediately with the new password. Password Reset validates a user's identity by going directly to the Oracle database and running queries against it. This tight integration ensures reliability.

Global Directory. [Chapter 10: Global Directory is an individual brand.] Most companies utilize a separate system for their corporate directory. This requires entering and maintaining all employee information in Oracle and then reentering that information into a separate system. Worse yet, they print the company directory from a separate system. Not only is this extremely inefficient, but there is a greater chance for error. In today's fast-changing world, employee information can change on a weekly basis. As a result, the "other" system is often neglected and its data are unreliable. Global Directory

solves this issue by “going to source” and gathering data directly from the Oracle database; thus Global Directory has up-to-the-minute validity. Global Directory allows users to query the database for a wide variety of information. The results can be customized to give your employees the depth of knowledge they require.

Global Directory functions as a part of the Oracle Applications. There are no outside Web sites to access or other applications to open. Using the export function, users can transfer results into Excel, XML, or CSV, making it possible to utilize the information for such items as contact lists, distribution forms, and mailing labels.

Place/Distribution. E-motion software is now headquartered in Bedford, Massachusetts. However, home office location has little to do with the actual distribution of e-motion software’s products since the products are installed and implemented at the client company. E-motion software will perform its own marketing channel functions (e.g., transactional, logistical, and facilitating) and does not foresee the need for any intermediaries in this process. [Chapter 13: Channel members facilitate the exchange between buyer and seller. E-motion software is the only channel member engaged in getting its product to the customer. Thus, it uses a direct channel.] However, e-motion software is a strong supporter of industry groups, such as the Oracle Applications User Group, and related industry events. Such support allows the company to become recognized as a vendor among Oracle Applications clients.

E-motion software does offer a partner program for companies that wish to resell or refer e-motion software products to Oracle ERP clients. The program is segmented into two separate categories. The Alliance Partner Referral Program is tailored for businesses that have customer relationships with companies in specific industries or with businesses

or IT needs that e-motion software programs can uniquely address. An Alliance Partner will identify e-motion software customers and refer them to e-motion software for a revenue share of the revenue from the referred account. As part of the program, Alliance Partner members receive all the training and materials needed to promote e-motion software solutions to their client base. The Alliance Solution Provider Program is designed for qualified Oracle-focused consultancies with a strong track record for providing top-notch service to their clients. Partner program members are trained and certified by e-motion software. Once certified, implementation partners can then configure and implement e-motion software products with unparalleled service and support. [Chapter 13: This is a form of a strategic channel alliance for e-motion software.]

Promotion [Chapter 15: E-motion software strives for integrated marketing communications.]

As a third party purveyor of products for Oracle, it is important for e-motion software to convey, clearly and succinctly, its “reason for being.” Company material will have the heading: “e-motion software: we keep the business of business moving.” [Chapter 16: This is the company’s unique selling proposition.] We will emphasize the Oracle connection with the following statement on documents, as appropriate: “Oracle clients around the country are realizing true gains in productivity and efficiency by taking every day tasks and putting them in *motion*.”

E-motion software will adhere to mainstream thinking regarding the promotion of third-party products for ERP solutions. [Chapter 17: As a complex buying decision, personal selling and strong print are effective methods for reaching potential customers.]

- A cohesive, easy-to-manuever, and user-friendly Web site (www.e-motionsoftware.com) [Chapter 16: Company Web sites can be used to introduce new products, promote existing products, obtain consumer feedback, post news releases, etc.]
- Recorded demos on the company Web site (requires users to register for a demo user account) [Chapter 9: Registration is important for customer relationship management.]

	License Price	Software Update & Support	Licensing Metric	Minimum
Application Infrastructure:				
Password Reset	\$15,000	\$2,700/year	Enterprise	N/A
Responsibility Management	\$6	18 percent/year	User	2,000
User Application:				
iPraise	\$10	18 percent/year	User	2,000
Corporate Information:				
Global Directory	\$2	18 percent/year	User	2,000

- Press releases as a member of the Certified Oracle Partner Network [Chapter 16: Public relations is an important element of the promotional mix. Press releases can place positive information in the news media to attract attention to e-motion software.]
- Demonstrations presented at trade shows and events [Chapter 13: Trade promotions push a product through the distribution channel and are popular among business marketers. Trade shows and events are an important aspect of sales promotions.]

- Word-of-mouth and reference sites [Chapter 16: Referrals are a good source for leads in the personal selling process.]
- The Internet via Google AdWords campaigns to drive potential clients to the company Web site [Chapter 18: The Internet has changed the advertising industry. Popular Internet sites sell advertising space to marketers, and search engine advertising is a popular approach.]
- Product datasheets that provide pertinent product data, features, and benefits of installation (available on the company Web site or via hard copy) [Chapter 16: Product information is critical in the sales process.]

Importantly, e-motion software is a company that relies heavily on direct selling to reach potential customers. [Chapter 17: Producers of most business goods rely more heavily on personal selling than advertising. Informative personal selling is common for installations such as those offered by e-motion software.] This promotional method requires a large amount of cold calling. [Chapter 17: Personal selling is important when product has high value and is technically complex. Relationship selling, or consultative selling, builds long-term relationships with clients.] E-motion software purchases the names of potential customers from marketing services that collect such information from customers of Oracle ERP products. [Chapter 17: Generating leads is the first step in the selling process.]

Price. E-motion software prices its products to sufficiently cover the costs associated with development, sales, and support and to provide cash flow for future growth and development. [Chapter 19: As a new company, e-motion software is very concerned about covering its costs and having money left over for investment into the business.]

While not stated exactly, it appears that the company has a profit-oriented pricing objective.] The table above provides the company's standard price list. These list prices can vary, however, as there is a trickle-down effect in the industry. Essentially, pricing starts with Oracle, trickles through the consulting firm, and then down to e-motion products.

Prices are based on industry standards for classification. [Chapter 19: Status quo pricing is when a company meets the competition or going rate pricing. It appears that e-motion software is using status quo logic in its price setting.] For example, Password Reset, as an enterprise system product, has a total purchase price of \$15,000, with a \$2,700 software update and support fee. [Chapter 19: Two-part pricing is when the company charges two separate amounts for the product. In this instance, the buyer pays the \$15,000 for the enterprise system product and then pays another \$2,700 for the update and fee.] Responsibility Management, iPraise, and Global Directory are priced on a per employee (user) basis with a minimum purchase per number of employees. For example, Global Directory is \$2 per employee with a minimum purchase of 2,000 employees. Thus, the least amount a company could purchase this product for is \$4,000. The 18 percent annual maintenance fee is the industry standard. [Chapter 19: This shows the two-part, status quo pricing.]

Five Years Financial Projection Plan

	2006	2007	2008	2009	2010
Revenues:					
<i>iPraise</i>	\$50,000	\$100,000	\$600,000	\$2,250,00	\$5,500,00
				0	0

<i>Responsibility Mgt</i>	\$60,000	\$80,000	\$160,000	\$420,000	\$700,000
<i>Password Reset</i>	\$225,000	\$180,000	\$180,000	\$150,000	\$75,000
<i>Global Directory</i>	\$45,000	\$75,000	\$180,000	\$300,000	465,000
Cost of Goods Sold	0	0	0	0	0
General &	\$350,000	\$765,000	\$1,600,00	\$2,165,00	\$2,600,00
Administrative			0	0	0

VI IMPLEMENTATION, EVALUATION, AND CONTROL

Marketing Research

The company needs to keep abreast of two distinct segments in the marketplace: its client needs and Oracle's direction. E-motion software needs to understand its clients and their ongoing needs. [Chapter 9: E-motion software captures customer data, storing and integrating it into a customer database.] This includes meeting current needs and forecasting future needs as the Oracle Application Suite continues to evolve. E-motion software must also maintain up-to-date and accurate intelligence on both current Oracle offerings and planned initiatives. [Chapter 9: Ongoing marketing research will help the company keep abreast of what is happening in the marketplace.] By doing this, it will be able to introduce products that complement new Oracle functions and will be less likely to offer products that compete for functions that are included at no charge in an Oracle license. Additionally, this will present opportunities to introduce products that complement new Oracle functionality.

Organizational Structure and Plan

As a start-up company, e-motion software currently has only one member on its staff, Scott Keohane. As e-motion software matures into a stable, profitable organization, the

need for employees will grow. The first foreseeable employee need is in the area of sales. The plan is to hire a salesperson in early 2006 to allow Mr. Keohane to continue his consulting on a regular basis, while at the same time ensuring a steady supply of funds for continued development efforts. To obtain the financial flexibility it needs to manage its cash flow successfully, the company has made contractors a significant component of its workforce. Contractors are used in the following areas: application development, database administration, and marketing. Current contractors have been associated with e-motion software almost since the company's inception and are largely credited with its early successes.

To provide a management resource from which Keohane can receive regular advice and guidance, e-motion software has assembled a nonvoting, nonbinding advisory council to assist in decision making, overall strategy, and execution. The advisory council is composed of four outside members who have made a commitment to provide their expertise and experience, free of charge, to e-motion software. Advisory members interact quarterly via teleconference.

Financial Projections

[Chapter 2: Evaluation and control are important mechanisms for monitoring the effectiveness of the marketing plan. Financial objectives are a common measure of success/failure.]

The financial objective is to be financially solvent within the first two years of operation.

Objective Metric: Sales of \$250,000 by the end of 2005

Sales of \$2 million by the end of 2007

Gross margin higher than 80 percent

Positive cash flow yearly

[Chapter 2: Stated objectives must be measurable and time specific.]

The five-year financial projection plan (in U.S. dollars) for e-motion software can be reviewed in the table above.

Implementation Timetable

[Chapter 2: Implementation is the process that turns a marketing plan into action assignments and ensures that these assignments are executed appropriately.]

2005

- The company plans to have three major Oracle clients by the end of 2005.

2006

- The company plans to have secured at least one client in each region of the United States by the end of 2006. This would mean at least one customer in the Northeast, the Mid-Atlantic, the Southeast, the Midwest, the Northwest, and the West Coast.
- Keohane plans to hire one full-time salesperson.

VII SUMMARY

E-motion software continually monitors activities with current and potential clients. As a consultant in the industry, Keohane is always on the lookout for potential clients. He has set quarterly and yearly sales targets, and actual sales will be compared to these quarterly plans. Additionally, Keohane will continue in his efforts to enlist at least one client in each of the major geographic regions of the United States. However, it may take a qualified salesperson to devote the time necessary to acquire new customers.

Additionally, by not being restricted to Keohane's current consultancies, a dedicated

salesperson could more readily identify potential e-motion software clients. Of major concern is that the current financial strategy of supporting the new business by personal funds from consulting may prove to be too onerous for Keohane.

Ultimately, the goal is to “make it big.” The hope is that, over the next five years, the small products that e-motion software has developed will hopefully generate cash sufficient to build a larger module that one of the larger ERP companies (e.g., Oracle) will want to acquire.