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## Marketing Management as a Differential for Excellence in the Third Sector

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### Abstract:

This teaching case aims to promote the immersion of readers into a reflection involving the Administration area in general, with a special focus on Marketing Management, based on the creation and trajectory of the IBS case. For the construction of this teaching case, data were collected from semi-structured interviews with mostly open-ended questions, with the Institute directors. There was also documentary research on social media to acquire more details about the Institution's history. The literature in the area of Business Administration, in general, does not approach the third sector from the perspective of strategic marketing. In this case, the achievements of a third sector institution based on the adoption of marketing excellence practices. Thus, it can be concluded that the third sector, when using well-designed marketing practices, achieves satisfactory results. Relating the originality, the case was described with real data, with the educational goal of offering the Professor a real representation about the concepts that involve the administration area, especially regarding the planning of a company and the marketing strategies used, to be worked with undergraduate students.

**Keywords:** Marketing-mix Management; 7P's; Non-profit Institution; Agribusiness.

## A Administração de Marketing como Diferencial para Excelência no Terceiro Setor

### Resumo:

Este caso de ensino visa promover a imersão dos leitores em uma reflexão envolvendo a área de Administração em geral, com foco especial na Gestão de Marketing, a partir da criação e trajetória do caso que envolve o IBS. Para a construção deste caso, os dados foram coletados a partir de entrevistas semiestruturadas, cujas questões foram em sua maioria abertas, com os diretores do Instituto. Também foi realizada uma pesquisa documental em mídias sociais para conhecer mais detalhes sobre a história da Instituição. A literatura da área de Administração, em geral, não aborda o terceiro setor sob a ótica das estratégias de gestão. Nesse caso, as conquistas de uma instituição do terceiro setor baseiam-se na adoção de práticas de excelência em marketing. Assim, pode-se concluir que o terceiro setor, ao utilizar práticas de marketing bem delineadas, obtém resultados satisfatórios. Em relação à originalidade, o caso foi descrito com dados reais, com objetivo educacional de oferecer ao docente uma representação real sobre os conceitos que envolvem a área de administração, principalmente no que se refere ao planejamento de uma empresa e ao uso de estratégias de marketing a serem trabalhadas por alunos de graduação.

**Palavras-chave:** Administração do Mix de Marketing; 7P's; Instituições sem Fins Lucrativos; Agronegócios.

## Marketing Management as a Differential for Excellence in the Third Sector

### 1. Introduction

Brazilian agribusiness is an important field for generating wealth in Brazil, according to the sector's GDP data released by Instituto Brasileiro de Geografia e Estatística<sup>1</sup> (IBGE, 2020). The Brazilian agribusiness sector is internationally known by its diversity of cultivated and exported products (CEPEA, 2021). The sector is also heterogeneous due to its operation indifferent segments, such as grain production, coffee, fruit, cattle, inputs, services, among others including the organic production segment.

When it comes to the organics segment, in October 2005, at an organic products fair in Rio de Janeiro State, Mr. Souza, and Mrs. Camargo were searching for new opportunities. They are Agronomic Engineers from São Paulo, and had a partnership in a company that provided technical consultancy for organic agribusinesses in the state of São Paulo. Meanwhile, in Paraná State, the Zootechnician Mr. Dudeck and the Agronomic Engineering Mr. Pires shared a consultancy company for agricultural and livestock organic sectors. Mr. Dudeck and Mr. Pires were also in the fair, when suddenly they met Mr. Souza and Mrs. Camargo.

The quartet shared information and discovered they had a common client: Brazilian Micro and Small Business Support Service (SEBRAE)<sup>2</sup>. After discussions, they agreed to join in a project to attend SEBRAE – and it was a success! Thenceforth, the Instituto BioSistêmico (IBS) was created.

Founded on May 1st, 2006, and established in Piracicaba City, located in São Paulo State, IBS is a non-profits third sector institution, under private law, with administrative and financial autonomy, constituted by a statute means (which contains all the action and social objectives rules) and, therefore, is classified as a Non-Governmental Organization (NGO).

Mr. Souza, Mrs. Camargo, Mr. Dudeck and Mr. Pires have something in common: they are all rural extension workers from the private market. They also started the society aiming to promote technological development based on the innovation and sustainability concepts, reasoned in the triple bottom line aspects: the social, the environmental and the economic.

Once IBS was founded as a non-profit institution, the quartet faced a Brazilian reality where non-profit institutions depend exclusively on fundraising, which can be done in different ways, through donations or the sale of products and services, for example. In this scenario, IBS founders thought of a way to raise funds in a sustainable way, without depending on the donors' commitment.

After a lot of alignment meetings, IBS founders' decided to raise funds by selling services. However, a persistent doubt haunted them: how to make IBS financially sustainable through the sale of services? Well, once the quartet came from the private market, they also had a common skill: knowledge of management tools used in for-profit companies.

Marketing administration in the private sector approaches strategic planning that enables the company to achieve sustainable competitive advantage (Churchill Jr. & Peter,

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<sup>1</sup>IBGE is a public institute of the Brazilian federal administration and is the main provider of data and information in the country (IBGE, 2021).

<sup>2</sup>SEBRAE is a non-profit private entity with the mission of promoting the sustainable and competitive development of small businesses. Through their experience they have become experts in small business development in Brazil. Their role is to foster entrepreneurship, providing guidance to help small businesses to grow and generate more employment, helping to develop the Brazilian economy (SEBRAE, 2020).

2013; Kotler & Armstrong, 2014). Especially the marketing-mix tool called “7P's” is used by companies to achieve their goals in their target market (McCarthy, 1975; Do & Vu, 2020). In this context, this teaching case was created to stimulate a reflection on the use of marketing strategies to achieve excellence in the third sector. The case tells the story of IBS, reporting decision-making that led the Institute to achieve relevance in its sector, making its context attractive for the managerial skills awakening in students.

### **1.1 IBS foundation and acting**

IBS “was born” amidst several strategic planning. According to Porter (2005), strategic planning comprises the formulation, the implementation, and the control of a company. The formulation involves the definition of mission, vision, and values. In this scenario, the founders defined the mission of the Institute: “To promote sustainability, through systemic actions and processes application, technologies, and skills that contribute to rural development” (IBS, 2020). The values include: “ethics and responsibility in relationships”, “transparency in the rendering of accounts”, “loyalty to partners, customers and society”, “commitment to results”, “constant evolution of skills”, “integrity and honesty” and loyalty and trust (IBS, 2020).

Thus, IBS vision for the future was developed: “To be a reference entity in solutions and support services for sustainable rural development and sustainability”, whose valuable contribution to customers and partners includes a) readiness: agility, simplicity, and effectiveness in interactions with customers; b) proximity: customer relationship management; c) reliability: authority from knowledge, skills, assertiveness, and attitudes; d) quality of deliveries: comprehensiveness, completeness, accuracy and precision; and e) innovation: proactive stance with anticipation of innovative solutions and services for customers.

Based on the personal values of the founders, the Institute received the name “BioSistêmico” (BioSystemic). The quartet wanted a name to reflect the view of the farm concept as an integrated organism to achieve impactful results in the product development and its property structure. Regarding its acting, IBS started its activity providing consultancy services in agribusiness, technical assistance, and rural extension. Technical Assistance and Rural Extension (TARE)<sup>3</sup> projects aim to provide rural assistance and guidance services, which promote management, production, processing, and marketing processes originating from agricultural activities, whose target audience are traditional family farmers and settled families of agrarian reform, with solutions and services including technical visits, training workshops, social assistance, and others.

However, as mentioned in the introduction above, the Institute raises funds through the sale of services to private corporations and to the government. For this, the entire IBS planning has been based on the “7P's” tool that configures the marketing-mix service (McCarthy, 1975). The 7P's are: product, price, place, promotion, people, processes, and physical evidence.

Nevertheless, it was not easy for the founders to define IBS scope regarding the 7P's as soon as it started its activities. Although IBS was founded amidst strategic planning used by companies of the private sector, its non-profit nature aroused in the founders a barrier in its

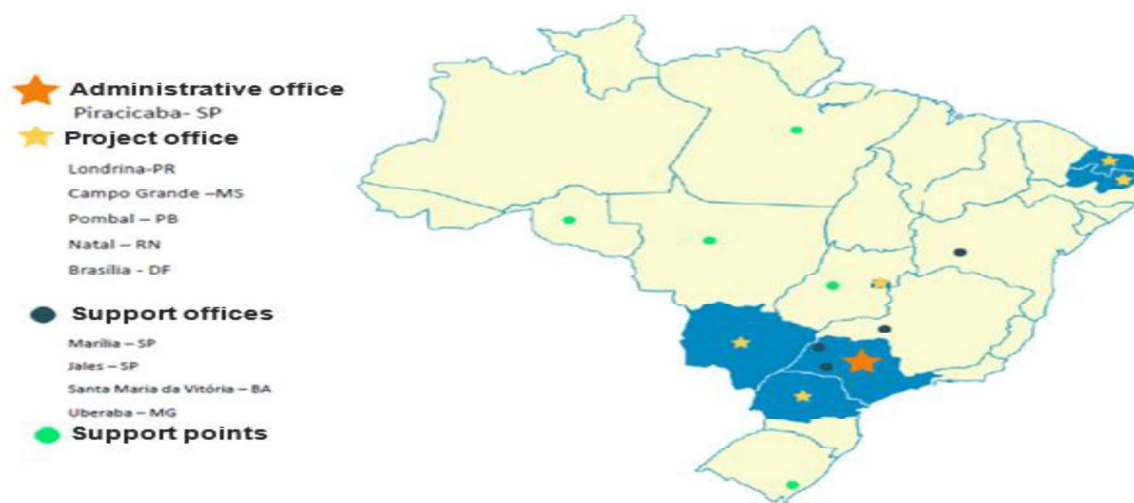
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<sup>3</sup>In Brazil, the Technical Assistance and Rural Extension (TARE) service (or Assistência Técnica e Extensão Rural - ATER) is offered jointly, constituting a policy that operates in the daily lives of farmers, building technological and organizational solutions with them for their work (BRASÍLIA, 2010).

first years of acting: the prejudice that third sector companies do not have enough competence to operate in the competitive market.

Overcoming this prejudice, nonetheless, was still not enough to overcome the competition with other private companies and compete with Brazilian public entities of reference in the technical assistance and rural extension service provision. So, thinking of having greater coverage in the offering of their services, in addition to attending the “place” variable regarding the 7P’s, since its creation in 2006 IBS established its first project office in Paraná State. Since then, the Institute has created work cells in the main Brazilian producing regions (Figure 2) to attend to the demands and overcome the competition.

With greater coverage of the country, IBS actually can operate providing agribusiness services in two major market positions: the first is the business-to-consumer service and the other is the business-to-business service. The second one is the currently IBS focus: to work with agribusiness companies and related sectors.



**Figure 2.** Locations of operation

Source: Offered by the Institute (2020).

As IBS was expanding its portfolio, Mr. Souza, Mrs. Camargo, Mr. Dudeck and Mr. Pires began to feel the need of improving themselves intellectually to consequently improve the quality of the services. In this scenario, Mr. Souza joined the Doctorate degree in Administration while Mrs. Camargo concluded the Master’s degree in Engineering. Mr. Pires and Mr. Dudeck, in turn, took an MBA in Project Management.

Once the founders were even more qualified to manage the Institute, it was time to expand the work team – but this was not an easy task! The founders began to search for people with personal values aligned with IBS values, as one of the marketing-mix 7P’s includes the variable “people”. But finding a qualified professional in the specific agribusiness segment in which the Institute operates was another major challenge that perpetuates the current business management.

Focusing on aligning the work team with IBS mission and values, the “solution” found was to offer training and qualifications to new professionals to ensure the quality of the service delivered. In this sense, the reinvestment of profits in professional qualification became part of the Institute’s strategies.

The literature involving the administration of third sector institutions reports that little attention to marketing strategies is given in institutions of this nature (Dolnicar & Lazarevski,



2009). It is also common that NGOs institutions do not focus on offering value to its customers or beneficiaries (Kotler & Keller, 2014). Trying to overcome this paradigm, IBS founders, early in 2008, created its first mobile unit – which is a vehicle specially designed to provide laboratory and testing equipment to rural producers (Figure 3).

The first mobile unit launched by IBS was baptized as “Vaca Móvel” (or “Mobile Cow”). The idea of adapting a vehicle came from an attempt to facilitate and increase the efficiency of problem solutions and the needs identification of the services beneficiaries. VacaMóvel, therefore, is composed of laboratory instruments that allow analysis in the rural environment.



**Figure 3.** Mobile units<sup>4</sup>

Source: Retrieved from Institute's webpage (2020).

The innovation of adapting a vehicle started promoting IBS in its sector once it gave visibility to the Institute and has been corroborating the Institute's mission, based on investing in technologies to the rural environment. So, since 2008 IBS has invested in mobile units' creation. “Rufião Móvel”, for example, is used for reproductive monitoring and evaluations since it consists of ultrasound equipment for pregnancy diagnosis, as well as instruments for artificial insemination and semen collection and analysis. “Gene Móvel”, in turn, is equipped with instruments for aspiration and selection of oocytes for the production of embryos through in vitro fertilization. “Agro Móvel”, on the other hand, has equipment and technologies for monitoring and characterizing critical factors that interfere in agricultural production, in addition to supporting the guidelines for nutritional management, feeding, pasture, and zootechnical management, to structure productivity. Finally, “Cordeirão Móvel”, however, works as a specialized mobile laboratory to improve reproduction, production, and product quality, also serving in the planning of meat supply for sheep and goats.

The mobile units use proposes to IBS clients a greater service tangibility. “Physical evidence”, however, is one of the 7P's and thinking in a way to achieve the customers' needs and desires, the founders of IBS started to combine the use of mobile units with the use of tablets, digital platforms, fast data processing and high information quality. As an example of a tangibility of a service, IBS clients can follow online project execution, where the documents were attached and can be consulted remotely on the Institute's website.

As digital technologies began to be implemented in the rural areas in 2008, the Institute started to face challenges about how to carry the new technologies to the customers and about the ability of the customers to work with such technologies. Thinking about that, in

<sup>4</sup>In English: Mobile Ruffian<sup>a</sup>, Mobile Gene<sup>b</sup>, Mobile Agribusiness<sup>c</sup>, Mobile Lamb<sup>d</sup>, Mobile Cow<sup>e</sup>.

2010 the founders established periodic training of users considering the characteristics of each beneficiary public. In other words, the Institute started providing a total customization training of its innovations according to the customers' and users' characteristics.

## **1.2 (An attempt of) extension of positioning strategy**

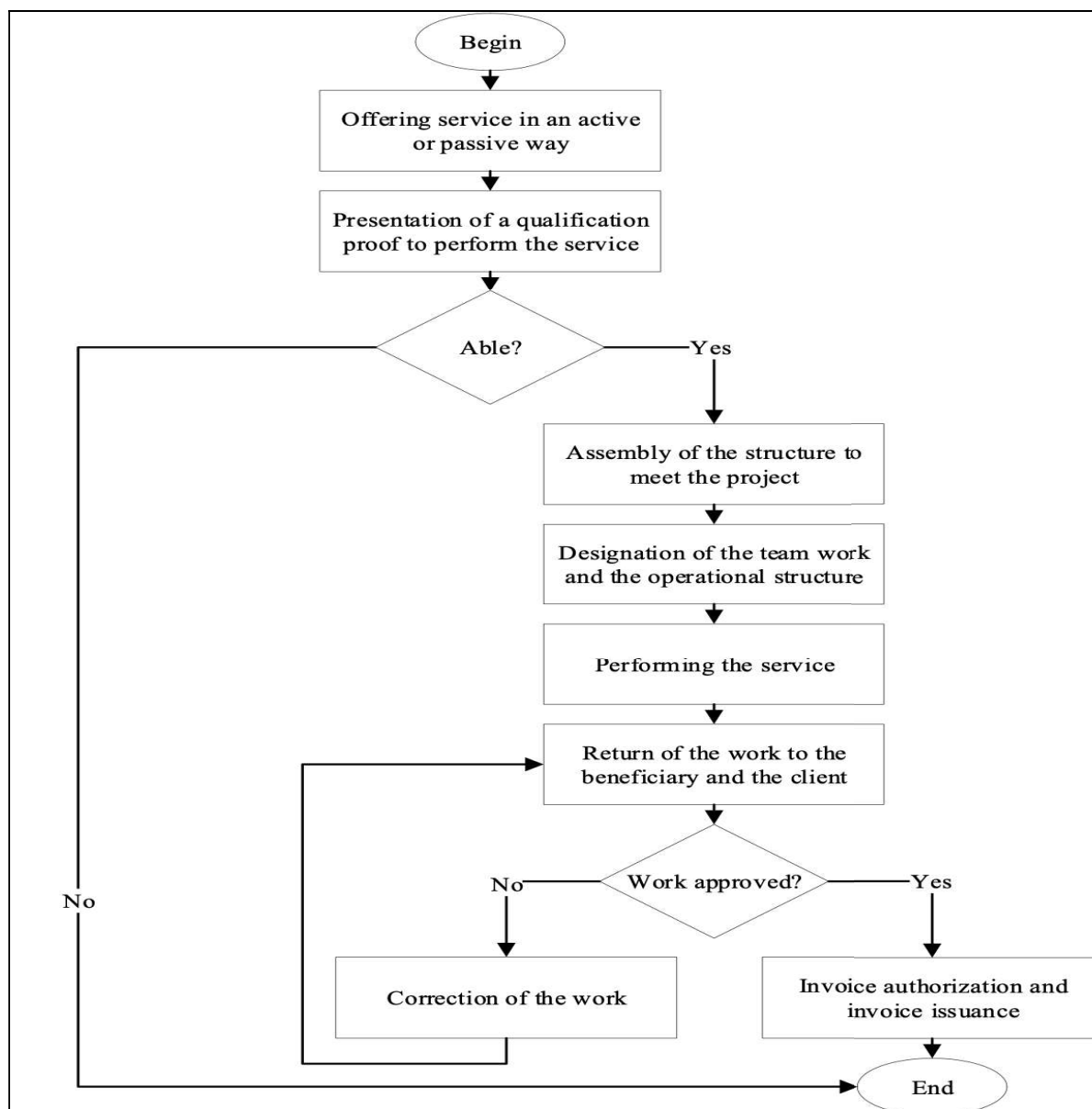
Until 2009, IBS focus of attendance was the public sector. However, in 2009, the Institute faced its first “crisis”. The resources’ inflow began to decrease since the Brazilian government reduced the investments destined for sustainable rural development. This fact reached IBS stability. As a matter of contingency, the Institute needed to extend its portfolio to provide services to the private sector.

Mr. Souza, Mrs. Camargo, Mr. Dudeck and Mr. Pires were working in a new “sphere”. Projects that used to be developed under a budget ceiling, started to be developed directly with the beneficiary. IBS strategic planning needed to be adapted to a new reality – and it did not work! The financial sustainability of the Institute was still unstable.

Working for the private sector in 2009, however, brought to the Institute an expansion in its portfolio. One of the projects developed by IBS for a for-profit company included Cargill. Cargill enriched the IBS portfolio for the approval of a project to be carried out by the Federal Government in 2010. Since then, the Institute could integrate projects subsidized by the World Bank for Brazilian sustainable development.

Participating in projects subsidized by the World Bank gave the Institute a greater relevance against the competition. IBS starts to invest assiduously in social media, newsletters, participation in fairs and events, participation in sectoral committees and commissions actively in the formulation of public policies and round tables discussing various issues related to agribusiness. The “promotion” strategies of the Institute started to be incorporated in the 7P’s.

Based in a frustrated contest whose attempt to work with the private sector failed (but was at the same time rewarding), IBS, from 2011 onwards, defined its focus on the execution of corporate and government projects. Therefore, the projects developed by the Institute are based on the budget provided by the client. Thus, when IBS has an authorized service provision process, there is an analysis of the project scope, then calculations are developed to define how activities and methodologies can be carried out. With this work scheme, IBS started to approach the market in two ways: “active”, through its promotional tools, and “passive”, when seeking and competing for public notice processes. Flowchart 1 illustrates the Institute’s project construction process.



**Flowchart 1.** Project construction process

Source: Created by the authors (2020).

The first international service performed by IBS occurred in 2012 in Uruguay. The project called “Eco Beef” lasted two years and aimed at analyzing live animals for slaughter, with activities consisting of technical assistance and rural extension.

In 2014, the Institute was among the top five companies in “The Best of Dinheiro Rural” (“*As Melhores da Dinheiro Rural*”) award, with the 4th place in the “Direct Agribusiness - Small Companies - Best Corporate Management” category of Dinheiro Rural Magazine contest. Another award was received in 2015 during a National Seminar on Good TARE Practices (“*Seminário Nacional de Boas Práticas de ATER*”), promoted by Ministry of Agrarian Development (“*Ministério do Desenvolvimento Agrário*”).

In 2017, IBS began to commit itself to the corporate responsibility initiative of the United Nations Global Compact (Sustainable Development Goals – SDG) covering human rights, work, environment and fighting corruption areas. IBS started considering 16 of 17

goals for world sustainable development. This commitment included “sustainability” in all IBS strategies, including the 7P’s.

In this contest of “social inclusion”, early in 2020, IBS founders began to reinforce its participation in social media, starting providing live broadcasts by the internet contemplating several topics of interest to farmers served in some projects. According to Mr. Souza, this initiative was highly praised and well received by farmers who could interact in real time with the extensionists. This initiative even supports the continuity of the guidelines of projects being executed by IBS during the isolation caused by the Covid-19 pandemic.

Indeed, during the crisis period caused by social isolation due to Covid-19, IBS developed production alternatives, as in the case of producer Mr. João Elias Bezerra. Mr. Bezerra reinvented himself when, due to the pandemic, he had to temporarily suspend his activities in house buildings, installed in Natal in Rio Grande do Norte, and started the rennet cheese production. Now it is one of the typical products of the hinterland and has a guaranteed market in the capital.

At the end of 2020, the Institute won the first place in agricultural services in “*Melhores do Agronegócio da Globo Rural*” award of Globo Rural magazine competition. For the award, six aspects of company management were evaluated: financial, human resources, quality, corporate governance, socio-environmental responsibility, and performance in the agricultural sector's production chain.

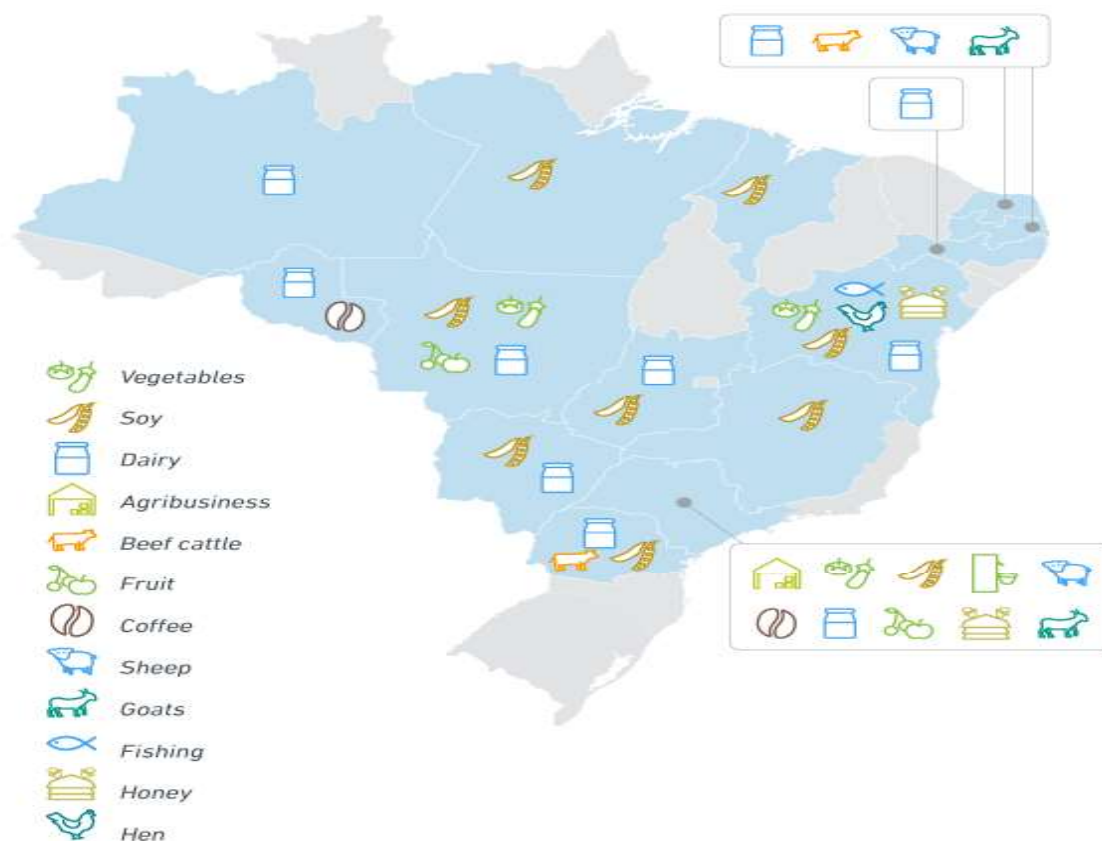
### 1.3 Going beyond and expanding horizons

In 2020, IBS general panorama included 15 employees who are part of the Institute administrative body and 412 associated and accredited professionals divided into several knowledge areas, mainly related to agrarian sciences. Vaca Móvel Project in 12 years of operation had 38,395 calls done, covering about 5,900 producers in 16 Brazilian States. Relating to the number of projects executed, in June 2020, the Institute had 336,037 technical assistance provided, 43,083 producers served, 62 projects executed and operations in 21 Brazilian States. Figure 3 summarizes the projects developed in Brazil.

Among IBS client’s scope were companies such as Cargill Agrícola S.A., Danone Ltda., Fibria Celulose S.A., Camargo Corrêa S.A. and Votorantim S.A., Premier Pet Comercial Ltda., Serviço Brasileiro de Apoio às Micro e Pequenas Empresas (SEBRAE) and Vigor Alimentos S.A. As for partners and main programs, the Institute has Federal Government, São Paulo State Government, Agência Nacional de Assistência Técnica e Extensão Rural (ANATER), Empresa Brasileira de Pesquisa Agropecuária (EMBRAPA), Universidade de São Paulo (USP), Instituto Florestal and Nestlé Brasil Ltda.

In summary, IBS has been an important Institute in Brazilian territory regarding its acting.





**Figure 3.** Projects developed in Brazil  
Source: Offered by the Institute (2020).

In May 2021, the quartet – Mr. Souza, Mrs. Camargo, Mr. Dudeck and Mr. Pires – held a meeting to assess the overall performance of IBS and its achievements in the Institute's 15 years of operation. At the meeting, the founders summarized the main strategies of IBS against the 7P's that delimit the main differentials of the Institute in face of the competition. Table 1 shows the result of this analysis.

**Chart 1.** IBS differentials using the 7P's

7P's	Definition	IBS	IBS' differentials against the competition
Product	Good or service.	Consulting, technical assistance, rural extension in agriculture, livestock, organic production technology, biotechnology, environment and corporate social responsibility.	Greater focus on the use of technological innovations for the producer, while observing the impacts of technologies on rural sustainability.
Price	Sale value.	Projects based on a budget provided by the client.	Adequacy of the project to be executed with the budget available, allowing a greater customization in the execution of the service.
Promotion	Communication.	Social media, newsletters, participation in fairs and events, informal visits to clients, participation in sectorial committees and commissions actively in the formulation of public policies and round tables.	On-site visits to introduce the Institute to clients. No dependency solely on social networks and traditional media.
continues			

Chart 1. IBS differentials using the 7P's (continuation)			
7P's	Definition	IBS	IBS' differentials against the competition
Place	Place of sale or service provision.	Installation of support office in different regions of Brazil and virtual service.	National action according to demand.
People	Work team.	Professionals with personal and technical values that corroborate the values of the Institute > Offering constant training and qualifications to improve service to farmers.	Selection for technical and personal skills, as well as constant training.
Processes	Standards of service.	Targeting the results of the service and not the effort to perform the service.	The focus is on meeting customer expectations, not just the contracted service.
Physical evidence	Tangibility.	Use of tablets, digital platforms, fast data processing and high-quality information.	Most of the services made are already in digital processes.

Source: Created by the authors (2020).

Since its first international project – Eco Beef – the founders have been seriously thinking about expanding IBS horizons. In 15 years of acting, IBS has now a greater portfolio to enter the international market. However, 15 years after the great doubt that haunted the quartet during IBS foundation, the same question emerges: how to achieve financial sustainability in the international market? How would the application of the 7P's be in an IBS internationalization project? Would the international focus also be on executing corporate and government projects for the public sector? Working for the Brazilian private sector, directly with the producer, was a failed contingency plan...

Although the quartet has been operating in the competitive Brazilian market for over a decade, none of them has enough outside experience. Trying to solve this dilemma, IBS signed an agreement with UNICAMP University in July 2021, specifically in the administration department, in an attempt to study and establish strategic guidelines to enter the international market. So, you, student, how do you think IBS would be able to achieve financial sustainability in the international market? Is the continuity use of private sector strategies enough for it?

## 2. Teaching Notes

This topic addresses the teaching notes, including the teaching objectives, 2.2. The sources and methods of data collection, the disciplines suggested for the use of the case, possible tasks to be proposed to the students with suggested answers, as well as the possible organization of the use of the case, a brief literature review, the case analysis, and the references used.

### 2.1. Teaching objectives

The present scientific work aims to promote the immersion of readers in a reflection on situations involving the administration area in general, with a special focus on marketing-mix management, so that, from a real case, there is a learning process on this topic.

### 2.2. The sources and methods of data collection

For the construction of this teaching case, data were collected from semi-structured interviews, whose questions were mostly open, with the Institute directors. There was also documentary research on social media to acquire more details about the institution's history.

### **2.3. Disciplines suggested for using the case**

In the case portrayed, it is possible to observe themes that relate to the development of an entrepreneurial process. The case presents the story of four rural extension workers' unions and the creation of an NGO that survives from providing consultancy, technical assistance, and rural extension services. In this context, it is strongly suggested that subjects in the administration course, especially those involving the marketing area, use the present study as a practice essay to reflect on a real theme with the aim of greater absorption and illustration of the content. More specifically, this teaching case is useful for several areas of administration, mainly for the disciplines of marketing, service marketing, agribusiness, non-profit institutions' management, and strategic management.

The case can be programmed in disciplines, preferably in undergraduates. But it is recommended that the application of the case be evaluated by the Professor, ensuring that their students have the prerequisites capable of leveling all students with the appropriate knowledge to answer the questions.

### **2.4. Possible organization of the class to use the case**

It is a case that presents real information that could be used to illustrate theoretical concepts. However, students must have previous knowledge of the following concepts to be able to answer the questions:

- I. Strategic planning, which includes knowledge of mission, vision and values definitions and their importance in the design of the target audience to allow marketing strategies to be defined;
- II. Marketing administration, with an emphasis on service marketing;
- III. Notions of expansion and growth strategies;
- III. Notions of the third sector business administration format.

The understanding of the concepts listed gather with the case description, will provide sufficient background for students to be able to debate the questions. Thus, it is suggested that, before the case introduction, students could take the following readings: "Broadening the concept of marketing" from Kotler & Levy (1969), or "Marketing: Criando valor para os clientes" from Churchill Jr. & Peter (2013), or "Princípios de marketing" from Kotler & Armstrong(2014), or "Administração de Marketing" from Kotler & Keller (2014) and "Marketing for a non-profit organization" from Blery, Katseli & Tsara (2010) or "Especificidades da Gestão no TerceiroSetor" from Pereira, Moraes, Mattos Júnior & Palmisano (2013).

Kotler & Levy (1969), for example, can be used to introduce students to the concept of marketing from a historical perspective and with an author considered one of the seminals in the area because it brings previous definitions to the approach of the marketing-mix and strategic planning aligned with the market. The same concepts can be found in Churchill Jr. & Peter (2013), Kotler & Keller (2014) or Kotler & Armstrong (2014), in the Portuguese language. Blery, Katseli & Tsara (2010), makes a relationship between marketing and non-profit organizations, analyzing the main marketing practices in this sector. In the Portuguese language, it is suggested Pereira et al. (2013). Ansoff (1965) and Rezende & Reis (2021) can be used to introduce some concepts and strategies to business growth and expansion.

To optimize the class time and ensure that all the themes presented in the case are observed and discussed, it is suggested that the reading of the case be carried out before the class and that the students have already highlighted the main points for reflection.

At first, during the class, the Professor will be able to elaborate questions, counting towards the overall grade, to ensure that the reading has been done previously. For this, the chairs could be arranged in a circle shape, in the classroom, to allow all students to participate and give their opinion about the deal.

In a second step, groups can be formed for further reflection on each point observed in the narrative. A written document could be delivered by the students, so that the answers can be documented. In other words, the students could be divided into three groups, for example, in which each one would be responsible for deepening the proposed questions that were divided above into three blocks: *Marketing-mix*, *Non-profits institutions management*, and *Generic questions*.

In the third and final stage, the groups could prepare seminars to present the proposed questions using the blackboard, poster, or multimedia material, such as slides, corroborating the practice with the proposed theory. For better absorption, while a group is presenting, the other students should take notes to promote questions to the presenting group and stimulate a debate. The delivery of a report for each presentation could also be proposed, whose score could add up to the overall grade.

Finally, the Professor must intervene during presentations and debates to clarify potential doubts and ensure that all-important points are addressed. It is worth mentioning that the Professor must provide feedback on each document delivered by the students so that they have the support of the points to be improved and even get used to more formal and scientific writing. This feedback is also important as it encourages students to fulfill the proposed tasks.

## 2.5. Possible tasks to propose to students

The discussion of the case in the classroom can be guided by the following questions divided into three blocks: marketing-mix management; non-profits institutions management; and generic questions. The answers and guides for teacher assistance are highlighted.

### Marketing-mix management:

#### **i. Discriminate the products (goods or services) offered by IBS.**

The literature points out that products can be divided between “goods” and “services” (Mallik & Achar, 2020). While goods are tangible, services are intangible. Based on the IBS case, this is an introductory question on a marketing-mix management topic with a low level of difficulty. Therefore, it is expected that the students, from a superficial reading of the case, will be able to identify that IBS is a service provider in the following areas: consultancy, technical assistance and rural extension in agriculture.

#### **ii. Describe the characteristics of each following 7P's, of service marketing, based on the products offered by IBS in Brazilian territory:**

The marketing administration field makes use of the “marketing-mix” instruments to allow the company to reach its target audience in its active market. Such instruments, in agreement with Do & Vu (2020), are: product, price, place, promotion, people, processes, and physical evidence. In IBS case, each tool are characterized as follows:

- Product: consultancy, technical assistance, rural extension in agriculture, livestock, organic production technology, biotechnology, environment, and corporate social responsibility.
- Price: projects are based on a budget offered by the client.
- Place: support office installation in different Brazilian regions, according to Figure 2, and virtual assistance.

- Promotion: social media, newsletters, participation in fairs and events, informal visits to clients, participation in sectoral committees and commissions actively in the formulation of public policies, and round tables discussing various issues related to agribusiness.
- People: to be part of IBS team, the professional needs to have personal values and technical that collaborate with the Institute values. When becoming part of the IBS team, this professional constantly undergoes training and qualifications to improve the service provided to the farmers. In addition, IBS performs the practice of reinvestment in the Institute, to strengthen the body of workers and develop technologies.
- Process: according to Flowchart 1, IBS approaches the market in two ways: active, through its promotional tools; and passive, when looking for forbidding notices. When IBS has an authorized service provision process, there is project scope analysis, then, calculations are developed to define how activities and methodology can be carried out. In this stage, a work team and an operational structure are defined. After executing the service, IBS is available by the client. If the service is approved, the invoice issuance is authorized.
- Physical evidence: IBS prioritizes the use of tablets, digital platforms, fast data processing, and high information quality. Its clients can follow online project execution, where the documents are attached and can be consulted remotely on the Institute's website. Moreover, the Institute provides mobile units that are vehicles specially designed to provide laboratory and testing equipment to rural producers.

**iii. Is the process of defining the marketing-mix more complex in a non-profit organization compared to a for-profit organization? Argue your answer based on the case presented.**

Although the literature argues that non-profit institutions should seek the loyalty of its clients equally to for-profit organizations (Yorke, 1984; Sargeant, Foreman & Liao, 2002; Blery, Katseli & Tsara, 2010), Blery, Katseli & Tsara (2010) point out that this nature of institution deals with different customers and stakeholders, which makes it difficult to establish a target audience and, consequently, to define the marketing-mix. Furthermore, Soares and Souza (2021) also point out the lack of professionals in third sector institutions specialized in marketing analysis, often accentuated by the lack of metrics that assess the effectiveness of such strategies when implemented (Wymer, 2021).

In this sense, this question admits several answers and varies as the theory is conducted by the Professor and presented to the students. However, it expected that the answer covers some topics: usually non-profit institutions do not see the importance in marketing-mix use; non-profit institutions generally have few resources and, consequently, do not use a financial resource to marketing management; generally, third sector institutions focus on local operations and hardly see the marketing-mix as an ally for market expansion. However, based on the case presented, it is possible to understand the importance of defining the marketing-mix in the third sector to increase its fundraising and expansion. Another point is the fact that the four founders had previous experience in private marketing, having concerns about strategic planning and, in addition, they look for intellectual development.

**iv. Why is it important to define the marketing-mix in non-profit companies? Prepare your answer citing examples from the IBS case.**

This question also admits several answers and varies as the theory is conducted by the Professor and presented to the students. However, the literature shows the importance of the third sector having greater knowledge of customers and beneficiaries to achieve greater



fundraising, according to Yorke (1984), Sargeant, Foreman, & Liao (2002) and Blery, Katseli, & Tsara (2010), and to increase brand familiarity and stimulate brand preference, in hopes of influencing brand choice (Lee & Ng, 2019). Furthermore, when an organization is well-structured, it is more likely to form alliances, establish partnerships and acquire new clients. Another benefit is based on the expansion. However, the real benefit of implementing marketing strategies is to boost organizational performance and create value for society (Lee & Ng, 2019). In this sense, it is observed that IBS can practice its mission for several beneficiaries on a national scale, to be the object of study of scientific works, to invest in research, technology, and development.

*Non-profits institutions management:*

**i. Can a non-profit institution effectively adopt the theories related to the 7P's of service marketing-mix? Justify your answer.**

The fact that non-profits institutions can effectively adopt the theories regarding the 7P's of service marketing faces similar challenges of for-profit companies. According to the literature, the adoption of the marketing-mix is part of an organization's strategic planning, that is, the definition of the direction the business will take relating to external trends, competitors and their internal strengths and weaknesses (Souza, 2011). In this sense, it is expected that this answer contemplates that companies need to be competing in the market for some time to be able to delineate their marketing-mix, as well as it is necessary to have a comprehensive strategic planning that includes a SWOT analysis, the definition of the mission, vision and values, and future business strategies.

**ii. How could IBS prepare a project to enter the international marketing based on 7P's marketing-mix?**

This question admits several answers and serves to stimulate students' creativity. It is recommended to prepare a chart (like chart 1) to summarize the answers.

**iii. In your opinion, is the continuity use of private sector strategies enough for IBS to enter international business? Why? Prepare your answer based on the Ansoff matrix.**

This question also admits several answers and serves to stimulate students' creativity. However, it is expected the students point out that to enter a new market, new strategies should be developed. According to Ansoff (1965) matrix, the company should look for four variables and draw some hypotheses.

		Products (goods or services)	
		Existing	New
Markets	Existing	<b>MARKET PENETRATION</b> - Maintaining its operating in Brazilian territory offering the same services.	<b>PRODUCT DEVELOPMENT</b> - Expanding the scope of services and continue with national operations.
	New	<b>MARKET DEVELOPMENT</b> - Maintaining the same scope of services and develop new markets.	<b>DIVERSIFICATION</b> - Expanding the scope of services in the foreign market.

If IBS wants to expand its market, it has two options for formulating strategies: maintaining its scope of services or expanding its scope of services and adopting the diversification of its product to compete in the foreign market. In this way, new strategies should be developed and the actual strategies based on the private sector are not enough.

**iv. Prepare a SWOT analysis of IBS considering the possibility of entering international marketing.**

This question also admits several answers and serves to stimulate students' creativity. However, Porter (2005) points out that SWOT analysis must consider the strengths, weaknesses, opportunities, and threats, and must also seek to evaluate the internal and external environments of the organization. In this way, a chart can be created to list this characteristic.

	<b>Helpful (to achieve the objective)</b>	<b>Harmful (to achieve the objective)</b>
<b>Internal origin (attributes of the Institute)</b>	<b>Strengths</b> <ul style="list-style-type: none"> <li>- Portfolio and national coverage;</li> <li>- Use of technology;</li> <li>- Adoption of tools of marketing management.</li> </ul>	<b>WEAKNESSES</b> <ul style="list-style-type: none"> <li>- Difficulty in attending the private sector;</li> <li>- Lack of qualified professionals.</li> </ul>
<b>External origin (attributes of the environment)</b>	<b>OPPORTUNITIES</b> <ul style="list-style-type: none"> <li>- Expansion to the abroad to increase the fundraising;</li> <li>- New experiences;</li> <li>- Creation of a global "brand".</li> </ul>	<b>THREATS</b> <ul style="list-style-type: none"> <li>- Government instability;</li> <li>- Competition;</li> <li>- NGOs prejudice.</li> </ul>

*Generic questions:*

**i. In terms of marketing, according to the case of IBS, what are the factors that can be considered as critical to the success in providing TARE services in Brazil?**

According to Porter (2005), critical success factors basically comprise the elements necessary for the company to fulfill its mission, such as reputation, qualification of human resources, location, among other factors. The critical success factors at the Institute related to the TARE service are key points that, when properly executed, define and guarantee the development and the Institute growth. In this sense, key points can consider the Institute stage (experience); the professionals' qualification; the support offices that subsidize the projects' execution; the partnerships that offer resources; the technical visits; training workshops; social assistance and, mainly, the availability of mobile units that offer the service in the local area. But the biggest key point is the culture of technological innovation that IBS has.

**ii. Identify in the case described**

In accordance with Souza (2011), the mission defines the reason for the existence of the company, while the vision expresses what the company wants to become in the future. The values, therefore, represent the expected behavior and limit what will be done searching for the realization of the vision. In IBS case, the mission, vision, and values are:

- Mission: "to promote sustainability, through systemic actions and processes application, technologies and skills that contribute to rural development".
- Vision: "to be a reference entity in solutions and support services for sustainable rural development and sustainability".
- Values: "ethics and responsibility in relationships; transparency in rendering of accounts; loyalty to partners; customers and society; commitment to results; constant evolution of skills; integrity and honesty; and loyalty and trust".

iii. What previous management characteristics enabled the Institute to reinvent itself during a period of crisis, such as that which occurred during the Covid-19 pandemic in 2020?

From the reading of the case, it can be identified that the concern of IBS in strengthening the immersion of its processes on digital platforms has constantly favored the institute to work remotely during COVID-19.

iv. In your opinion, why wasn't it possible to achieve excellence using marketing-mix management theory at IBS when the Institute tried to attend the rural producer directly? Give suggestions to improve the organization's marketing management to the Institute work directly to the rural producer.

This question is also subjective, but it is expected of the students to reflect on how the Institute's strategies should be adapted to direct service to the rural producer, considering the 7P's.

## **2.6. Brief literature review**

### **2.6.1. Strategic planning**

The planning concerns the administrative function responsible for defining the organizational objectives and the formulation of the plans and activities necessary to achieve them (Sobral & Peci, 2008). It is, therefore, a process consisting in the systematization of early decision-making (Bateman & Snell, 2007).

Strategic planning, in turn, is the process by which it seeks to determine how the organization should act, considering its internal and external environment, to define strategies to achieve its global objectives (Souza, 2011). With this, strategic planning involves all sectors of the organization and involves a look at the present and the future of the business.

Strategic planning thus defines the direction of the business but should allow certain flexibility that ensures that the company is aligned with external trends, to ensure its competitiveness and survival (Souza, 2011).

Briefly, strategic planning comprises three main stages: i) formulation, ii) implementation and iii) control. The first step - formulation - is divided into three steps: SWOT analysis; definition of mission, vision, and values; and formulation of strategy.

The mission defines the reason for the existence of the company, translating as what it proposes to do. The vision expresses the dream of the company, that is, what it wants to become in the future. The values, therefore, represent the expected behavior and limit what will be done searching for the realization of the vision (Souza, 2011).

SWOT analysis(strengths, weaknesses, opportunities, and threats) seeks to evaluate the internal and external environments of the organization. The external environment can present opportunities to be explored that will generate benefits and threats that can put the organization at risk, such as competition, the threat of new entrants to the market, the emergence of substitutes, the government, macro-environmental trends, and others, which impact the formulation of strategic planning (Porter, 2005).

The internal environment is composed of potential forces, which configure the competitive differential of the company, and weaknesses, which summarize the disadvantages faced by competition, the lack of vision and flexibility, and the absence of essential competencies, which also impact on the organizational level. An example includes the company's technological support, financial, human, and physical resources, organizational structure, culture, marketing compound, among other variables (Lahtinen, Dietrich & Rundle-Thiele, 2020).

After defining the vision mission, values, and SWOT analysis, the company can elaborate its competitive strategy. Porter (2005) suggests three generic strategic approaches for the company to outperform its competitors in one sector: cost leadership, differentiation, and focus.

Cost leadership implies producing at a lower cost in the industry, selling cheaper, or getting a higher profit margin. On the other hand, the differentiation consists of the highlights the company has concerning the competition in terms of service, comfort, technology, and technical assistance, for example. Finally, the focus strategy consists in the exploration of a particular market segment, geographic area, or product line, for example (Porter, 2005).

Moreover, in the process of formulating the strategic plan, the company must detect what are its critical success factors, that is, after identifying its strengths and weaknesses, the company can identify key positions that will help in achieving the organizational goal. Generic examples of critical success factors are good reputation, human resources qualification, localization, expertise, stakeholder relationships etc. (Porter, 2005).

The subsequent stages comprise the implementation and monitoring of the strategies, which must be controlled through performance indicators (Souza, 2011).

On the other hand, the expansion and growth strategies of a business can be done in its “home” territory or in the international market. At this stage, the companies seek to reach new markets and gain competitive advantage.

Ansoff (1965) proposed a matrix that serves as an analysis, management and planning tool for the expansion and growth of a business, called the “Ansoff Matrix”. Similar to SWOT analysis, Ansoff matrix allows a company to visualize its possible scenarios in a more accurate way, and explore the strengths and repair weaknesses of the market macro environment.

Basically, the matrix considers four scenarios. “Market penetration” is about expanding into the existing market with an existing product. “Product development” aims to expand the existing market with the development of new goods or services. “Market development” is about exploring new markets, but about existing products. “Diversification” is about expanding the scope of products in a new market.

After the company outlines its possible scenarios, strategies must be aligned to know the competitors. For this, market research can be an instrument to align future plans (Rezende & Reis, 2021).

### **2.6.2. Marketing administration**

Marketing management comprises the alignment of the business with its strategic planning to increase the visibility of the business and is behind the relationship between the company, customer, and market. Marketing management thus seeks to meet needs, desires and demands. In addition, it improves existing products through innovations, generates demand, creates jobs, and creates an authentic customer base (McCarthy, 1975; Lahtinen, Dietric & Rundle-Thiele, 2020).

Marketing management makes use of the so-called “marketing-mix”, which comprises a set of instruments used for the company to achieve its objectives in its target market. Such instruments are called “7P’s” because they represent the product, price, place, promotion, people, processes, and physical evidence (McCarthy, 1975; Do & Vu, 2020; Mallik & Achar, 2020). However, the composition of the marketing-mix depends on the company’s objectives, the available budget, and the environmental contingency.

The product refers to the goods and services offered by the company. A good, when palpable; and service, when intangible. Goods make up the majority of production and marketing efforts. Services, on the other hand, have been the focus of marketing concentration, given the evolution of this sector in recent years (Do & Vu, 2020; Mallik & Achar, 2020).

The price, in turn, must be defined with the organization's strategies, considering the expected profitability and the delivery of something that has value for the customer. The promotion is related to the communication that the company establishes with the market. In recent years, companies are present in social networks, since in the past a strong strategy was the dissemination in radio, TV, and newspaper. As technology evolves, communication channels also have to adapt (Do & Vu, 2020; Mallik & Achar, 2020).

The place refers to how the product is exposed to the consumer. Here, marketing strategies seek to focus on distribution aspects, which go beyond the concept of product delivery because it involves the breadth of the business in a region. Thus, in the service sector mainly, as the business expands, its distribution points increase to better serve the customer (Do & Vu, 2020; Mallik & Achar, 2020).

People are important as they contribute to innovation and customer service. In this area, the company must invest in recruitment, selection, and training so that customers are satisfied. The processes, however, are more present in companies that offer goods, but the client must have contact and knowledge of all trading procedures. Finally, the physical evidence, especially in the service sector, concerns the tangible evidence offered during the service, examples being the company's design, the equipment used during the service, stationery items, the uniform of employees, among other tangible variables (Do & Vu, 2020; Mallik & Achar, 2020).

Finally, a company that has excelled in marketing achieves the maximum level of harmony in its internal, external and interactive environment, that is, by the skills whose employees serve customers. Mainly in the service sector, the marketing-mix is being widely used for the pursuit of excellence in the face of competition, in which companies have invested highly in technology, in strict standards of profit definition, monitoring, customer focus and sustainability (Do & Vu, 2020; Lahtinen, Dietrich & Rundle-Thiele, 2020; Mallik & Achar, 2020).

### **2.6.3. Administration of third sector institutions**

In agreement with Lee & Ng (2019), non-profit organizations are facing increasing challenges for survival and the fulfillment of their mission. Given their growing importance in the economy and society, many of these organizations are actively exploring how to improve their organizational performance.

Although the relationship between for-profit and non-profit companies and their stakeholders is different, a shared similarity is the need to communicate with the target audience (Wymer, 2021). So, like any other company, third sector institutions need good management to ensure their survival. According to Dolnicar & Lazarevski (2009), Lee & Ng (2019) and Wymer (2021), organizations can adopt more business techniques used in the for-profit sector to gain resources to fulfill their mission of generating some social benefit and to increase brand familiarity and stimulate brand preference, in hopes of influencing brand choice.

Thus, because they are exposed to the environment, the institutions of the third sector also face competitiveness and because they usually operate with limited financial resources,



this sector has invested in marketing approaches to better serve the public interest (Blery, Katseli & Tsara, 2010). For Yorke (1984), non-profit institutions must seek the loyalty of their customers equally to commercial organizations.

Sargeant, Foreman, & Liao (2002) discuss that in any sector of the economy, the company must focus on its customers if it wants to survive eventually. According to the authors, given the evolution of the service sector, working with the marketing compound has become a precondition for competition in the market.

Blery, Katseli, & Tsara (2010), on the other hand, point out that because third sector institutions deal with different stakeholders, it is difficult to establish a target audience and define marketing strategies, requiring these companies, high level of strategic planning. As a suggestion, the authors cite the identification of stakeholders, the construction of a positive image, investment in communication, and the exploitation of distribution channels. Such strategies are aligned in the SWOT analysis, also discussed in the previous topics.

Additionally, more recently, Soares and Souza (2021) add that the difficulties in implementing marketing strategies in the third sector are since only a small proportion of team members in these organizations are actually trained in “marketing”, which makes it difficult to implement some strategies such as the marketing-mix. Another point to be considered is the issue of the lack of metrics by these institutions to assess the effectiveness of marketing strategies when implemented (Wymer, 2021).

Thus, the research by Dolnicar & Lazarevski (2009) proved that institutions in the third sector, when oriented to the market, are more likely to fulfill their mission and increase the effectiveness of their management. In this same sense, Bruce (1995) argues that the use of marketing strategies in these institutions should be used in an attempt to better value and serve customers and beneficiaries. For the author, institutions in the third sector sin by offering standardized and undifferentiated products, a condition that leads these companies to the closure of their activities.

## **2.7. Case analysis**

The case analysis will follow the proposed questions previously presented. However, the Professor has full autonomy to decide the order of use of the questions.

Section 1 seeks to offer to the students a moment of reflection about the intrinsic set of the marketing system called "marketing-mix", based on a real case, enabling them to experience intellectually answering questions whose answers admit several solutions. The questions are mostly conceptual and the elements of which are necessary to answer are sufficiently described in the case. In case of doubt, the Professor just needs to give clues about the answer path based on the answers suggestions that are offered. In addition, this section merges the concepts of marketing management with the third sector administration “style”.

In Section 2, the target is to introduce a reflection on the adoption of marketing practices in non-profit companies. As they are institutions that depend on fundraising, the concern with marketing planning and coordination is often ignored. However, according to the literature, the third sector, when it has well-designed marketing practices, achieves satisfactory results. So, here, the questions demand a higher level of reflection between theory and practice. They admit several answers, and the Professor must leave the student free to propose solutions.

Finally, Section 3 addresses other issues unrelated to sections 1 and 2. Here, the questions involve strategic planning concepts and seek to make the closing of the case. The

answers are sometimes implicit in the case and, therefore, the teacher must help the student to find the answer alone.

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