

Calendar-led marketing issues and perspectives: A depth interview approach

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Abstract:

The influence of calendars in the marketplace and the marketing relevance of calendar timing are discussed in this depth interview with Charles L. Martin – the PIR Professor of Marketing at Wichita State University who has asserted that calendars may be the most widely used marketing planning tools in the world and that “period” or “periodicity” should be regarded as an essential element of the marketing mix. Accordingly, Martin expands upon and clarifies some of the content found in his most recent publications and videos pertaining to “calendar-led marketing” (CLM) and “calendar-led buyer behavior” (CLBB). Among other issues and perspectives, he answers numerous questions regarding the relevance of CLM and CLBB, guidelines regarding the implementation of CLM, circumstances justifying heightened levels of CLM practices, disadvantages and caveats regarding CLM, and the tyranny of the calendar.

Keywords: Calendar-led marketing, calendar-led buyer behavior, calendars, planning, timing, seasonality, synchromarketing

1. Introduction

Although the calendar timing of buyers and marketing professionals can be critical to the success or failure of marketing programs, the roles that calendars and calendar timing play in the marketplace are under-researched topics in the marketing literature, according to Charles L. Martin – the PIR Professor of Marketing at Wichita State University (Wichita, Kansas USA), former Marketing Editor at *Bowlers Journal International* (1990-2001), former Editor at *Journal of Services Marketing* (1990-2014) and pioneer in what he has dubbed “calendar-led marketing” (CLM) and “calendar-led buyer behavior” (CLBB). In the array of journal articles, books, presentations and videos where he’s tackled the topic in recent years, Dr. Martin asserts that “period” or “periodicity” should be promoted to the elite p-status in the marketing mix -- alongside other well-known marketing mix elements including product, price, promotion and place (distribution). According to Dr. Martin, the success of “what” marketers do with the traditional four P’s depends heavily on “when” they do it.

After thinking about calendars and calendar timing and digesting the voluminous background materials provided by Dr. Martin, Captain Tuttle and an energized group of marketing students at Wichita State University cornered Dr. Martin multiple times in 2020 and 2021 and bombarded him with a list of questions to further explore the topic. Accordingly, the sections below contain edited excerpts from these interviews, followed by a reference list and bibliography of additional resources that interested readers may consult to learn more. Further, interested readers may contact Dr. Martin directly at Wichita State University (Charles.Martin@wichita.edu) or through the contact page on his book series’ website (www.MarketingMarbles.com).

2. Background: Calendars and calendar timing

Tuttle et al: Thank you for taking the time to share your insights. Perhaps we could begin with you telling us how you first developed an interest in the roles that calendars and calendar timing play in the marketplace?

Martin: Thank you for your interest. Of course, like almost everyone else, I’ve been using calendars in some form or another all of my life; they’re inescapable. Even before I could read or recognize numbers on a clock or calendar, I sensed that my life was largely calendar-driven, although I didn’t articulate it as such. I knew different times of the day, days of the week and periods of the year were earmarked for certain activities. For example, when I was about four years old, a typical day consisted of wake-up time, breakfast time, play time, nap time, bath time, a time to sit in the front yard and wait for my older sister to walk home from elementary school,

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and so on – all arranged predictably sequentially by my mother to give me a sense of cognitive control and stability, a certain pattern or rhythm to my life to keep me organized.

As I grew, I learned about the day-of-week calendar cycle too. That is, certain days of the week were reserved for school, church, family outings, and even pancakes. And, I also learned about the annual calendar cycle -- that shopping for clothes and school supplies predictably preceded the start of the school year, followed by colder weather, my birthday, Halloween, Thanksgiving, Christmas, and so on.

Like everyone else, I learned that each time period differed – each accompanied by a somewhat unique set of behaviors and sentiments. Each time period was at least a little different, if not special, relative to other time periods in its respective cycle. That is, Tuesdays certainly differed from Saturdays, mornings from afternoons, winters from summers, and so on. Although there are plenty of exceptions, many of those behaviors, associations and sentiments stay with us throughout our lives and influence our personal lives as consumers as well as our professional lives as businesspeople.

Tuttle et al: Interesting, so the uniqueness of each time period influenced your behavior. Over time, you accepted or were “led” by the calendar periods. But I’m not clear about the “pancakes” period you just referred to?

Martin: Well, both of my parents worked when I was a youngster, so we rarely had time for pancakes during the week. Sometimes we’d have pancakes on weekends though, when my mother had more time to cook. So, pancakes became associated with the union of two fairly specific calendar periods on two different calendar cycles, i.e., mornings on the time-of-day cycle and Saturdays and Sundays on the day-of-week cycle. For me, pancakes helped to make those periods special, and I still associate them with weekend mornings.

Tuttle et al: Okay, but when did you begin pursuing the topic as an academic interest?

Martin: It was in the autumn of 2004. I was teaching an undergraduate marketing management course and was in the process of preparing a module for the course about the topic of planning. While outlining the steps in the planning process (i.e., situation analysis, goals/objectives, strategies, implementation, etc.), I felt compelled to provide an overview of some of the most common planning-related tools that marketing professionals use. The textbooks talked about SWOT analyses, the Boston Consulting Group’s growth/share matrix, Gantt charts, and others. But upon reflection and discussions with practicing marketers, I reached the conclusion that calendars may very well be the most widely used planning tools -- used heavily by marketing practitioners, but also by professional buyers and household consumers. Much to my surprise, however, the textbooks I consulted made almost no mention of the use of calendars in the planning process or the importance of calendar timing in the success or failure of marketing plans, with one noteworthy exception (i.e., Thomas and Housden, 2002). Yet, it seemed intuitively obvious that the degree of success for many, if not most, marketing plans hinge upon calendar timing. So, that experience aroused my intellectual curiosity and prompted my search for relevant data and insights.

3. Interactions with marketing professionals

Tuttle et al: It’s interesting and commendable that you would use a teaching experience as a springboard for research. You mentioned that discussions with marketing practitioners helped lead you to the conclusion that calendars were perhaps the most frequently used planning tools. How so?

Martin: Well, how many marketers do you know who don’t use some sort of calendar -- such as a daily planner -- to organize their time, schedule appointments, note deadlines, and otherwise prompt them to do *what* they need to do *when* they need to do it?

Tuttle et al: Your point is well taken. I don’t know of any. If there are some, they must have great memories or be ineffective in their jobs.

Martin: I agree. And further, the fact that most buyers also rely heavily on calendars implies that it may be advantageous for marketers to think “calendar” when trying to synchronize their plans with those of buyers. Buyers certainly think “calendar” when planning their day-to-day lives and their interactions with businesses.

Tuttle et al: So, that’s what you mean when you say it’s a calendar-led world, right?

Martin: Right, but let me elaborate. In the exploratory stages of the research, I asked marketers to describe the planning process(es) they used in their organizations. Almost without exception, woven through their descriptions were multiple mentions of the roles that calendars played – mentioned much more frequently than popular SWOT analyses or other planning tools. Sometimes they’d begin describing the planning process by talking about the textbookish steps alluded to previously, or some variation -- that is, conducting a situation analysis, followed by the articulation of goals or objectives, then selection of strategies and tactics, then forecasting, implementation and control steps, and so on. But, before finalizing marketing plans, they almost

always reported practices that reflected their mindfulness of calendar constraints or calendar-related windows of opportunity. As examples, they'd say things like:

- “If we don’t get our [fourth quarter] orders to suppliers before the end of June, we’ll miss the entire holiday season, so we’ve got to nail down our Christmas-season forecasts fairly early in the year.”
- “We focus a great deal of promotional effort on paydays and weekends, when our key target markets are more likely to have money to spend and the time to shop.”
- “Our biggest industry trade show takes place during the third week in March, so we always plan new products to be introduced then, because buyers attending the trade show always ask, ‘What’s new?’”
- “We try to time the majority of our marketing communications to coincide with the time periods when buyers are most inclined to be interested in our brands; for example, cooler mornings work particularly well for our hot beverages.”

Some marketers’ approach to planning actually *begins* with calendars, apparently more so in smaller businesses than in larger ones. For example, planners sometimes start by culling through last year’s calendar, or the last few years of calendars with accompanying notes or daily/weekly/monthly reports to see what they’ve done in the past, when they did it, their rationale, and which marketing efforts worked or didn’t work, and why. They ask themselves questions like these: Which marketing activities were successful due to the scheduled timing? Which ones might be more effective during other calendar periods?

I think the reasoning for beginning with the calendar in the planning process is the implicit or explicit belief that, over time, the timing of marketing plans tends to gravitate toward superior time periods and that the timing of marketing activities in recent years reflects the accumulated calendar-timing wisdom of the organization. If the organization is reasonably successful, it makes sense to look to past calendars as starting points in shaping the timing of future marketing activities. Of course, astute marketers always think about improving the timing of marketing activities, and truly new and innovative marketing programs may require a fresh look at timing considerations, so it’s doubtful that one should rely entirely on past timing decisions. But, the idea of starting the analysis by first examining the timing of recent marketing plans has merit, in my view – especially in a stable environment, where the organization’s objectives and planned marketing activities are similar from year to year.

4. Calendar-led marketing (CLM) and calendar-led buyer behavior (CLBB): Definitions and relevance

Tuttle et al: That makes sense. Marketing managers simply cannot escape the calendar. They live in a calendar-led world that includes the marketplace where buyers, intermediaries, suppliers and competitors also live. Now I’d like to know more about calendar-led marketing (CLM) and calendar-led buyer behavior (CLBB) and how marketers go about implementing CLM. First, tell me what you mean by CLM and CLBB?

Martin: Broadly defined, CLM is the strategic and tactical consideration of calendar periods in the development of the content and timing of marketing efforts, resulting in the non-random distribution of marketing efforts across time to increase both marketing effectiveness and efficiency. The practice of CLM is rooted in the understanding that a significant portion of the variation in buyers’ purchase preferences, media habits, many other consumption-related behaviors, and buyers’ differential responsiveness to marketing efforts, corresponds to the cyclical nature of calendrical time periods – varying somewhat predictably from one part of the day, week, month or year to the next.

Tuttle et al: That definition comes across as a bit academic. Can you clarify it in everyday language?

Martin: Okay, I’ll try. Let me put it this way: Astute marketers rarely, if ever, engage in marketing activities on a random or arbitrary basis, i.e., there’s always a rationale for doing what they do – to capture buyers’ attention, to communicate information, to persuade buyers, to close a sale, and so on. Increasingly, it appears to me, the timing of marketing activities is not randomly or arbitrarily selected either. So, marketers are calendar-led when they seriously consider timing issues – *when* they do what they do. It doesn’t mean that all marketers will reach the same conclusions about the most appropriate timing, because other objectives are typically taken into consideration too, and their markets – including their buyers – are likely to differ. But calendar-led marketers are always thinking about calendar timing issues: When is the best time to implement a marketing program? What are the likely consequences of implementing a particular initiative during one calendar period instead of another one? How should marketing efforts be modified if launched during one period versus another? And so on. Thus, CLM is simply ensuring that calendar timing issues are always ingrained in the marketing planning process. Sometimes calendar timing is a more relevant consideration than at other times, but for astute calendar-led marketers, it’s always considered.

Like all effective marketers, calendar-led marketers are sensitive to the characteristics, behavioral patterns, preferences, sentiments, etc. of buyers, so they examine how customers and prospective customers handle time across the calendar – when they search for information, when they buy, when they consume, when they are most attentive, when they engage in product-related behaviors, when they are in a positive mood, when they tend to be exposed to media (and thus media advertising), and so on. So, CLBB is simply looking at timing issues from buyers' points of view. Understanding CLBB enables marketers to better synchronize the timing of their marketing efforts with buyers' calendar timing considerations.

There are many reasons why understanding CLBB is highly relevant to marketing, but one key take-away point is CLBB's cyclical nature. Think about behavior, in general, and CLBB, in particular, like a series of large circular pegboards (one for each of the four calendar cycles – daily, weekly, monthly and annual) onto which buyers tend to hang specific behaviors and sentiments. There are many exceptions, but with each turn of the cycles, buyers tend to repeat many of the same behaviors and sentiments at about the same points on the cycles. They may start thinking about lunch at about the same time each day, shop for groceries on the same day(s) of the week, spend money on car payments or rent on about the same days each month, and shop for gifts at about the same times of the year as annual holidays approach. Because these cycles are cyclical, meaning that they repeat again and again and again, the behaviors and sentiments that accompany each point on the cycles tend to be largely predictable. And the predictability is powerful; for marketers it means they can be ready with the right brands, the right communications and the right prices – all at the right times, when the marketing mix is likely to resonate with buyers. And, for marketers, it follows that fewer resources are wasted – like money needlessly spent on poorly-timed ad campaigns for heavy overcoats in the summer or Santa-shaped chocolate bars in July.

5. CLM processes

Tuttle et al: Okay, it's easy to grasp your seasonal examples of the folly of hyping overcoats in the hot summer and Santa-shaped chocolate bars too many months before Christmas, but is there more of a systematic process for developing and implementing CLM efforts? In other words, how does one "do" CLM, or is it more of a marketing philosophy? Can you give our readers some guidance to help them to be calendar-led marketers or to take their calendar-led marketing efforts to a more advanced level?

Martin: Great questions! Although these issues are addressed in some of the publications included in the bibliography, I'll briefly comment here. I do view CLM as a marketing philosophy in that it should be woven into the fabric of everything marketers do. The world is so calendar-led that marketers' thinking and marketing efforts should be aligned on the calendar with everyday phenomena in the world, generally, and in the marketplace, in particular.

That said, there are also some processes and checklists that marketers can use to better sensitize themselves and their teams to CLM opportunities. First, as I've already mentioned, think of each calendar period on the four major cycles as being unique, or potentially so. Examples: Mornings are not the same as afternoons. Sundays differ from Wednesdays. The first few days of the month vary from the last few days of the month. Winter is not summer. And so on. Recognizing the potential differences across calendar periods helps keep us alert to the possibility that windows of marketing opportunity are more likely to be open during some periods than others. Staying alert to the variation across time periods helps us avoid foolish efforts to sell heavy overcoats during a hot summer, to revisit that example.

Still, CLM is not a separate set of steps in the marketing process, but a practice that should be integrated with other key aspects of marketing plans. Accordingly, I like to think about marketing initiatives like a two-sided coin – with "what?" and "when?" sides of the coin. So, assembling a marketing plan or program might first entail studying the "what?" side of the coin. What would we like to do in terms of traditional marketing strategy considerations such as what target market, what product, what price, what promotion and what distribution? But then, before finalizing the marketing plan, flip the coin and consider the "when" side too: Given *what* we'd like to do, *when* is the best time to do it? Then reconsider the "what" side: Given *when* we'd like to implement the marketing plan, are modifications to the *what* issues in order? – possibly bouncing back and forth between the *what* and the *when* sides of the marketing coin until each side is aligned with the other. For example, the marketer for a retail mattress store in the U.S. might decide to stimulate demand with a sales event (*what*), decide that late May – around Memorial Day holiday – would be the best timing (*when*), then incorporate a patriotic appeal using the American flag as part of the ad campaign to promote the event (*what*).

Another way to think about how to "do" CLM is with a series of key questions pertaining to CLBB. Again, these questions are elaborated upon in some of my previous publications listed in the bibliography. One question is *when do buyers have money to spend?* We know that buyers are inclined to spend more money when they have more money available to spend, so it can make sense to time marketing communications and promotional events around the times buyers are likely to receive money – such as on paydays and, in the U.S. and many other countries, when income tax refunds arrive.

A second and somewhat related question is *when do buyers have the time to shop?* Buyers' discretionary time periods, like evenings, weekends and holidays for many U.S. consumers, represent open windows of marketing opportunity – time periods when buyers are more likely to be responsive to sale events or other promotional offers.

Another question is *when do buyers have the need or interest in the product category or brand?* Accordingly, promotional efforts to sell hot beverages in the winter and cold beverages in the summer are likely to be more effective than promoting each category during the opposite seasons. If you're not sure when buyers tend to have a need or interest in the brand or product category, consider plotting sales over time to help you visually detect the peaks and valleys in demand. Most, if not all product categories experience some sort of predictable variation in demand across calendar periods in one or more of the four major calendar cycles.

Finally, *when are buyers exposed to, or potentially exposed to media (and thus media advertising)?* To illustrate, radio advertisers know that they can reach many buyers in the early mornings and late afternoons during weekday "drive times" – periods when consumers are listening to their automobile radios while commuting to and from work or school.

6. Relative importance of CLM vs. CLBB

Tuttle et al: Okay, those are some useful guidelines to help marketers step-up their CLM game, but you refer to both CLM and CLBB. Which is more important -- CLM or CLBB?

Martin: Although I may speak more of CLM, they're both important. Both marketers and buyers are calendar-led and to be an effective marketer you have to be familiar with both perspectives. Think of it this way: marketers and buyers are continuously engaged in a relationship or dance. Marketers' moves are greatly influenced by those of buyers and vice versa. Marketers' calendars influence buyers' calendars and buyers' calendars influence marketers' calendars. For example, retail stores often adjust their store hours to accommodate shoppers' preferred shopping times, but buyers may adapt to the stores' calendars too, by adjusting the timing of their shopping outings to make sure they get to the stores during trading hours.

So, to be a marketing pro, you've got to understand buyers' calendars and what drives them – how calendars affect buyers – if you expect to orchestrate effective marketing programs that will resonate with buyers. Eminent marketing scholar Phil Kotler captured the essence of this idea when he quoted an old Spanish proverb: "To be a bull fighter, you must first learn to be a bull" (Kotler, 1980). Although Kotler was talking about marketing in a more general sense, one really can't talk "CLM" for very long without talking about CLBB too. Personally, when I refer to CLM, I'm usually thinking in terms of CLBB too; the two go hand-in-hand.

7. CLM as a new form of marketing?

Tuttle et al: So, many marketers or aspiring marketers reading this interview may have had one or more courses in marketing or buyer behavior. When you insert "calendar-led" in front of "marketing" you seem to imply something different, so I'll ask very directly, is CLM a new form of marketing? Should we forget other methods of marketing and hop on the CLM bandwagon, so to speak?

Martin: No, no, no, no, no! CLM isn't a challenge to existing definitions of marketing. Nor is it a new way of marketing that involves abandoning established processes or paradigms. To put it succinctly, it's simply an effort to heighten the marketing profession's sensitivity to the importance of calendar timing. The "CL" in front of "M" simply serves as a reminder that timing matters, or more specifically, that calendar timing matters. By thinking more about calendar timing, marketers can increase both the effectiveness and the efficiency of their marketing programs. As the marketing environment becomes more competitive, marketing professionals must continually look for new ways to improve what they're doing. CLM is one avenue for doing so, but that doesn't preclude others.

One could argue that CLM, in general terms, is nothing really new. To use the coat example once again, manufacturers have probably known for hundreds of years that outerwear sells better nearer the onset of colder weather than during the heat of the summer. When they intentionally time their marketing efforts accordingly, that's calendar-led marketing. As a more specific and slightly more recent example, about 100 years ago (winter of 1922) The Coca-Cola Company noticed seasonal fluctuations in the sale of Coca-Cola (lower sales in winter than summer), so to boost winter-time consumption, the firm ran a print campaign that portrayed snow skiers gliding down a snow-covered mountain slope while donned in heavy coats, caps and scarves and holding bottles of Coca-Cola – suggesting that drinking Coke during cold weather is entirely appropriate. So, although I may have coined the term "calendar-led marketing," I'm certainly not the first marketing person to think about marketing in the context of calendars.

Tuttle et al: Okay, forgive me for being so blunt, but if CLM is really nothing new, why are we having this interview?

Martin: Although some aspects of the practice are ancient, others are not. When I talk to organizations about CLM, managers routinely nod their heads affirmatively, because they've already taken some CLM initiatives. But in most cases, some CLM-related mistakes are still being made, in my opinion, and there's almost always more that organizations can do to more fully reap the benefits of CLM. So, I see myself as an advocate to nudge marketers to the next level of CLM rather than asking them to wipe the slate clean, so to speak, and begin anew.

Advances in technology have opened many windows of opportunity for calendar-led marketers – CLM opportunities that already existed in some instances, perhaps, but are now much easier for marketers to seize. For example, today's automated point-of-purchase cash registers routinely capture time data, so retailers know not only what individual shoppers buy, but the date and time of day they bought it – plus the price(s) they paid. With this data, retailers can determine when buyers tend to be in the mood to purchase particular items, so they can know when advertising might be most effective. Or, the time-stamped data can be used to assess the effectiveness of campaigns intended to stimulate buyer demand at specific times.

If retail stores also have electronic price tags throughout the stores (like Kohl's department stores in the United States), marketers also have the option of changing prices frequently throughout the day or week, which they may want to do if their stores attract a more price-sensitive clientele during certain times of the day or days of the week than at other times. In the "old" days when price stickers were affixed to each item in the store, retailers might have changed prices occasionally – possibly seasonally -- but it was not realistic for them to change prices several times throughout the day or week. So, advances in technology often create opportunities to advance CLM practices [see Martin (2019a) to learn more about how technological innovations influence calendar timing in the marketplace].

8. Marketing relevance of multiple calendar cycles

Tuttle et al: Thanks for the clarification. In your writings about CLM, you talk about the "four major calendar cycles": the time-of-day cycle, day-of-week cycle, day-or-period-of-month cycle, and day-or-period-of-year cycle. More concisely, you sometimes refer to them as the daily, weekly, monthly and annual cycles. So, I have two questions about these cycles. First, is there one of the four cycles that you view as the most important or most marketing-relevant? And second, by referring to the four cycles as the "major" ones, you imply that there are other calendar cycles too. If so, what are they?

Martin: Good questions. It's obvious that you came prepared for this interview! I've thought quite a bit about which cycle is or should be dominant, but I'm hesitant to take a stand on this. Perhaps future research can address the question more definitively.

I believe the extent to which one cycle is more or less marketing-relevant is largely situational; in other words, it depends on the circumstances. For frequently purchased consumer items, say cups of coffee rather than automobiles, the shorter daily and weekly cycles may be more relevant. When many members of the target market(s) receive income on specific days of the month rather than weekly or bi-weekly income, the monthly cycle may play a more significant role. And, the monthly cycle may be highly relevant among organizational buyers whose budgets are allocated on a monthly basis. Brand managers of brands closely related to one of nature's seasons (like overcoats, already mentioned) or one of culture's seasons (like Santa-shaped chocolate bars) may find the annual cycle most relevant.

Historically, it may be that the annual cycle has received the greatest amount of marketing attention, and this may be justified, but because it is much easier today to collect, analyze and act upon data pertaining to the other three cycles than ever before, their potential relevance should not be underestimated. Again, I think it's largely an open question for future research to investigate.

Opps, I forgot what your second question was -- about the cycles?

Tuttle et al: Yes, you have talked about the four "major" calendar cycles, but are there other calendar cycles that marketers should know about too?

Martin: Sure, there are. Some tend to be market- or industry-specific or not particularly relevant to all marketers, but could be highly relevant to some marketers. I'll mention a few of these along with some possible implications.

One is the four-year presidential election cycle in the United States. That is, a presidential election is held every four years in the U.S. on the first Tuesday after the first Monday of November – such as in 2020, 2024, 2028, etc. Obviously, the four-year presidential cycle can be critical in political marketing circles, but beyond politics, per se, I'd be very sensitive to this cycle if I were marketing goods and services to the federal government or to countries outside of the U.S. that depend on U.S. federal aid, because presidential changes are often accompanied by changes in federal funding priorities.

Even if I were a brand manager for everyday domestic household items, say ice cream or laundry detergent, as examples, I'd be sensitive to the crowded and expensive advertising environment as the national election approaches and the media is flooded with political ads and political commentary. If I were planning to launch a new brand or campaign, I'd be inclined to wait until after the election when I'd be more likely to garner more favorable advertising rates, preferential timing of marketing communications, and otherwise generate more media buzz.

Major sporting events, like the Winter Olympics or soccer's FIFA (Fédération Internationale de Football Association) World Cup also pop up on the calendar every four years – thus creating four-year cycles that could be highly relevant to marketers who market specific sports, sports equipment, sporting events, and so on, but also to marketers (like Coca-Cola and Budweiser, as examples) that heavily market their non-sport brands *through* sports.

Other cycles revolve around industry-specific events, such as major trade shows that attract buyers and sellers alike. Such events are often the focus of new product introductions, promotional campaigns, and special “deals” that sellers can use to engage buyers at the trade shows. So, if an industry supports two major trade shows annually – say, one in October and one in April – then marketers may find themselves adjusting their marketing efforts to coincide with these two six-month cycles, each of which may involve a plethora of sequenced and carefully timed marketing activities to prepare for the trade shows, attend the trade shows, and then follow-up after the trade shows.

Of course, there are several other “cycles” frequently mentioned in marketing circles and many of these are very relevant -- like the biological life cycle, the product life cycle and the family life cycle. But, with a few exceptions, because these are generally not linked to specific dates or recurring time periods on the calendar, they are not calendar-related cycles and thus not part of the discussion of CLM or CLBB.

9. CLM caveats

Tuttle et al: It's clear that you're an advocate of CLM and CLBB and it's easy to see why. It's a fascinating topic. But, in the interest of a balanced presentation, are there any disadvantages or cautionary points you'd like to share with readers? In other words, is there a downside to thinking in terms of CLM and CLBB?

Martin: You're right to point out that I enjoy the topic, but I have to admit there are a few disadvantages to consider and some cautions to exercise. None of these dampen my enthusiasm, but readers should be aware of them as they formulate their calendar-timed marketing plans.

First, CLM can be a bit too short-term oriented when a balance with the longer-term is called for – what former Harvard marketing professor Theodore Levitt might dub as “CLM myopia” if he were still alive to address the topic today. That is, if your marketing forecasts and plans never focus beyond the calendar cycles, your organization may miss some of the breakthrough innovations and opportunities that might otherwise transform the industry or product category and change the entire trajectory of the organization for decades to come.

Bill Allen and the Boeing Company (aircraft manufacturer) comes to mind. In the 1950s, Allen – the CEO of Boeing at the time -- could see that the future of the aircraft industry was going to be more about jet engines than propeller-driven aircraft. So, he pretty much bet the future of the company on the jet age, which shook up the company in the short-term, but in hindsight, proved to be the right longer-term decision. At the time, if Allen had been overly focused on determining what month of the year airlines forecasted their future aircraft needs or identifying the best day of the week for sales reps to find plane buyers in a favorable mood to buy, then today we might be reading about Boeing only in history books. So, while I maintain that being conscious of calendar timing issues can certainly increase the effectiveness of marketing efforts and help marketers to get more marketing bang for their buck, so to speak, a CLM-focus can be problematic if it crowds out other highly relevant aspects of marketing decision-making.

A second concern is the obsessive quest for the illusive “perfect” calendar period – a search that can paralyze a marketing team and thus jeopardize their ability to capitalize on “good” or “acceptable” calendar periods. Let me explain.

One CLM principle is that not all calendar periods are equal in terms of the marketing opportunities they represent. This implies, and is often the case, that marketing resources may be better spent during some calendar periods than during others. To draw upon examples previously mentioned, relative to the winter, summer represents more of a closed window of marketing opportunity for heavy overcoats. Likewise, promotional efforts to sell Santa-shaped chocolate bars in July are likely to generate fewer sales than if the same promotional efforts were timed for December. So, it's easy to withhold marketing resources for several months each year during lull-demand seasons when sales tend to be sluggish. Further, as sales reps plan their calls on candy buyers (to extend

the Santa-shaped chocolates example), it's tempting to avoid cold calling on Mondays if one believes that buyers are likely to be in meetings all day, or any weekday after 4:00 p.m. (when buyers may be tired and won't listen intently to sales presentations) or Fridays (when buyers could be out of their offices and on the golf course). Any time period a few days prior to a major holiday may be scratched off the appointment book too, as buyers may be preoccupied with those holidays. Other calendar periods may be discounted because of inclement weather believed to negatively affect buyers' moods, or due to warm, sunny days (when buyers may be out of the office enjoying the sunshine). And so on. Taken to the extreme, there may be only a few brief calendar periods each year determined to be "ideal" for sales calls or promotional efforts. Waiting for these periods could mean missing out on other periods that may not be so perfect, but potentially productive nonetheless.

Next, predictability is an issue that's accompanied by both potential advantages and potential disadvantages. A key advantage of scrutinizing time periods on the various calendar cycles is their predictable cyclicity. On the daily cycle, afternoons always follow mornings and are always followed by evenings. On the weekly cycle, Mondays are predictably followed by Tuesdays, then Wednesdays, and so on. This predictability helps marketers to time marketing activities advantageously, but doing so may predictably signal to competitors the timing of those marketing efforts – thus enabling competitors to better time their counter responses. For example, if an astute calendar-led marketer for a retail store has studied the timing history of its competitors, she may recognize that a major competitor always plans a big sale event to begin on the weekend before a major holiday. Accordingly, she might successfully intercept a portion of the competitor's would-be shoppers by staging her own promotional event to begin a few days before the competitor's event. So, if an organization is *too* predictable with its CLM efforts, it could be handing its competitors a timing advantage.

Finally, another potential drawback of predictably cyclical marketing efforts is the unintentional systematic exclusion or alienation of some customers. Weekend sale events, for example, may appeal to customers who don't work on weekends and therefore may have the time and inclination to shop on weekends, but if *all* sale events are timed accordingly, would-be shoppers whose jobs require them to work on weekends may be repeatedly excluded. One remedy is to ensure that the marketing activity – the sale event, in this example – spans multiple calendar periods, like the entire week, or more, instead of a weekend only.

10. Circumstances when CLM is most relevant

Tuttle et al: I don't doubt that you could make the case that marketers across the wide spectrum of industries, product categories and markets should step-up their CLM efforts, but are there some subsets of marketers who should listen more carefully than others? In other words, are there some circumstances in which CLM's relevance is on steroids, so to speak?

Martin: Yes, I think CLM is highly relevant across the board, but there are some instances where extra attention paid to the topic is warranted. Here are a few key questions marketers can ask themselves to help determine if additional CLM efforts may be in order.

First, *does demand fluctuate predictably across calendar cycles?* That is, are sales consistently higher during some times of the day, days of the week or periods during the month or year than during others? As I mentioned earlier, I find it helpful to first plot periodic sales data on a series of graphs (one graph for each of the four major cycles). Such graphs often make the peaks and valleys in demand visually apparent. But don't look solely at fluctuations in aggregate demand patterns; if possible, break down the data and examine the timing patterns across individual product categories, SKUs, sales reps, territories and market segments. Demand patterns that may be obscured when data are aggregated may be quite pronounced when scrutinized by more specific variables.

As a general rule, the greater the systemic, predictable variation in demand across time periods, the greater the potential benefit from employing CLM strategies to alter the demand patterns. I think this is especially true when the reasons for the periodic variation are understood. As discussed in my *Marketing Review* article (Martin, 2017a) and summarized in a subsequent video (Martin, 2018), strategic demand-manipulation possibilities include efforts to extend the peak periods of demand or fill in the valleys, among others.

Other key questions pertain to the flexibility of the timing, physical location and inseparability of purchase and consumption. That is, *to what extent must consumption take place at a specific time and place? And, to what extent is it necessary for one or more buyers to join with the seller (or producer) to simultaneously produce and consume the product?* Typically, less flexibility is associated with a greater need to be sensitive to a wider range of CLBB and CLM issues. As a simple example, consider the calendar-timing challenges faced by life insurance salespeople who must coordinate their schedules with those of prospective policyholders to discuss the prospects' needs, review and clarify policy features, and so on. If their calendars can't be synchronized to facilitate mutually convenient meeting times, sales are not likely to materialize.

As a second example, attracting sports fans to a live spectator sporting event scheduled at a specific stadium on a specific date and time is likely to be a more challenging timing or synchronization task than inviting

fans to view the same event via a televised broadcast that fans can view from the convenience of their own homes and, thanks to the magic of recording technologies, at a time of their choosing.

As still another example, think about coffee. When it's sold as a *can of grounds* at a grocery store, purchase may take place at any time the store is open, because the timing of consumption doesn't coincide precisely with that of purchase. In contrast, coffee bought and sold *by the cup* at a coffee shop requires a more precise degree of synchronization. That is, the buyer's interest in a cup of coffee and its accessibility must converge at the same point in time for a sale to transpire; buyers of *cups* of coffee are ready for immediate coffee consumption. Thus, coffee marketers at coffee shops are likely to find the study of CLM and CLBB more relevant to their coffee sales than would coffee grocers.

Tuttle et al: I think I follow you. You're saying that the less timing flexibility that exists or, perhaps to put it another way, the greater the calendar constraints involved, the more relevant or more necessary the study of CLM and CLBB becomes. Is that right?

Martin: Yes. At the very least, it's important to recognize when timing inflexibility or calendar constraints exist -- when they may pose problems or block the potential impact of marketing efforts. Sometimes this is as simple as being more customer-centric -- shoving aside one's ego and personal preferences and accepting what may be helpful to customers, but possibly viewed as inconveniences to the organization. By this I mean adjusting the organization's or representatives' calendars to better mesh with those of customers, rather than expecting customers to adjust to the organization's or reps' calendars. This could mean extending hours of operation or meeting with clients in the evenings and on weekends, as possible implications.

I should add that technology can help -- often greatly help -- to address some of the timing synchronization challenges. In the examples mentioned above, life insurance salespeople can provide clients with online tools to educate clients about alternative insurance products. And they can encourage communication via telephone or email to reduce the need for less convenient face-to-face meetings. As mentioned above, sports organizations can broaden their audience by broadcasting events on television. And coffee marketers can look to vending machines to stimulate sales when coffee shops are closed or not conveniently located.

11. Potential (in)flexibility and the tyranny of calendars

Tuttle et al: Interesting, so firms and marketers should think about how they might be more flexible with their calendars and work to alleviate some of those calendar constraints for customers that they may not even be aware of? Or, to put it another way, firms should consider adjusting their calendars to fit those of buyers rather than expecting buyers to adjust to firms' calendars?

Martin: That's right. Sometimes it's a simple matter of taking a fresh look at the way the organization has done business for years. Perhaps a service firm has always closed at noon so employees could have a lunch break, but is it possible to stagger those lunch breaks so the firm can stay open throughout the day? Or, is it really necessary for a financial institution to require loan payments be due on the first day of the month, or might they effectively differentiate themselves by allowing customers to choose their own payment due dates, monthly or otherwise? Similarly, as a final example, is it defensible for hotels to require guests to check out by a specific time designated by the hotel -- typically 11:00 a.m. in many parts of the U.S. -- rather than customizing check-out times to fit guests' timetables?

Admittedly, there may be legitimate justifications to continue decades-old timing practices, but I believe savvy calendar-led marketers are those who challenge the organization to continually rethink such practices. Of course, our friends in operations are quick to point out the extra costs associated with extended hours of operation or, in the hotel example above, the extra expense of employing housekeeping staff throughout the day. But then again, our other friends in IT are equally quick to show us how organizations may be able to maintain some sort of a calendar-friendly and cost-efficient 24/7 *online* presence.

Although brick-and-mortar facilities may not be able to justify the additional expenses of staying open 24/7, many do tinker with extended trading hours in an effort to balance cost considerations with customers' calendar convenience -- for example, by altering trading hours on selected days of the week or periods of the year. I think that's a step in the right direction, but can create calendar confusion among customers -- perhaps mostly among less-frequent customers -- who may have trouble remembering a bewildering array of different calendars maintained by dozens of businesses that serve them.

Tuttle et al: Okay, so is that what you mean when you express the concern that many people may suffer from what you've described as the "tyranny of calendars"?

Martin: Well, yes, sort of. But the phenomenon I dubbed as the "tyranny of calendars" is actually much broader and, to some extent, inevitable. It's the feeling of oppression or victimization that some people experience frequently, but probably all of us feel at least occasionally -- the feeling that we've lost control of our

own schedules and thus of our lives, the feeling that calendars are, to a large extent, in charge. For example, when you asked if you could interview me today, I was flattered and wanted to agree to the interview right away. But I couldn't agree immediately. First, I had to check my calendar and get its "permission." When my calendar said, "okay, your schedule is free enough to arrange an interview," I still needed to coordinate with my wife, who proceeded to check for possible conflicts with her calendar, our daughter's calendar and my daughter's school's calendar before she could give her nod of approval. Fortunately, the calendar stars were in alignment – whew! – so here we are.

Unfortunately, there are many other times when calendars don't align – giving rise to scheduling conflicts; a letting go of preferred ways of spending time; a sense of urgency, time poverty or perceived need to hurry to "keep up"; and, as a result, more stress and anxiety. While some people view calendars much more positively – as tools to help keep them organized and accomplish more than they would if they simply meandered their way through life without regard to time -- some people (and again, probably all of us at least occasionally) view calendars' forced timing efforts as tyrannical. And, the perceived tyranny, I hypothesize, is magnified when we try to accommodate an onslaught of "other" calendars that seem to wedge their way into our lives. But the reality is that none of our individual calendars are capable of accommodating all the calendars that would like to exert their will upon us. And, of course, that's stressful.

As implied earlier, a key consideration for marketers is to keep timing flexible or minimize timing requirements altogether, and thus not contribute to buyers' perceptions of a tyrannical world of calendars plotting against their time freedom.

Tuttle, et al: Wow! I've never thought about tyranny like that, but I can certainly relate to some of the calendar pressures you mentioned. As a society, how did we get to that point?

Martin: As I mentioned, the timetables imposed by our own calendars and those of others, whether or not we consider them as tyrannical, are somewhat inevitable. It's easy to see this when we think about the original calendar, that is, the one imposed by nature.

Nature's calendar has always been the alpha calendar – the most assertive and insistent of all calendars, and the one to which other calendars tend to defer. For thousands of years, hunters, gatherers, fishermen and farmers have known what time of the year or day is best to find game, edible fruits or fish, or when to plant and harvest, and so on. Since before the beginning of recorded history, man has known that survival depends on his ability and willingness to align his calendar with that of nature's calendar. Missing nature's windows of opportunity to hunt when game is plentiful or plant when crops have favorable climatic conditions to grow could mean starvation.

You may recall from childhood the book series written by Laura Ingalls Wilder -- later adapted as a television series, "Little House On the Prairie." The plot of the first book in the series, *Little House in the Big Woods* (1932), follows Wilder's childhood family through a typical year in the 1870s in rural Wisconsin, beginning in late fall. Not surprisingly, the book describes the changes in nature's seasons and how the family adapted to each season – detailing the activities and chores that coincide with each time of year. In the book, nature's calendar is the plot's star calendar, with all other calendars and associated behaviors merely playing supporting roles. For example, winter evenings were associated with family gatherings by their cabin's warm fireplace while Wilder's father, "Pa," sang, played the fiddle and told stories to his young daughters. The book explains that during warmer months, time and Pa's energy level didn't permit the luxury of such activities – in effect, a calendar prohibition not interpreted as tyrannical by Wilder, but as an unfortunate survival reality in rural Wisconsin in the 1870s. These wintertime family gatherings around the fireplace is only one example in the book of how nature's calendar was given top priority, with all other calendars and associated activities following, but not allowed to conflict with nature's calendar.

To some extent, advances in technology since Wilder's childhood have helped us to counter some of nature's calendar timing constraints, like the invention of electric light bulbs that enable us to push back the darkness and be productive after sundown. But nature's calendar continues to be highly influential.

So, to answer your question more directly, Mother Nature first trained mankind to adapt to *her* calendar, with numerous human behaviors adopted throughout the daily and annual cycles to coincide with what she dictates as suitable times for each behavior. That's how we first became calendar-led and accustomed to the periodicity of behavior. But then society jumped in and began introducing other periodic behaviors that often had little to do with nature, per se, but still capitalized on mankind's tendency to habitualize behavior when it's expected at periodic calendar intervals. So, today we have designated days of the week or year to attend school, go to our jobs, relax, worship, celebrate holidays, honor loved ones, observe patriotic anniversaries, and so on.

12. Additional information

Tuttle *et al.*: This is so fascinating. I can see why you've taken an interest in CLM and CLBB. Unfortunately, we've almost reached the page limit imposed by the Journal, so we need to wrap-up the interviews. Before we part, though, can you point interested readers toward other CLM- and CLBB-relevant literature?

Martin: Sure, several of my relevant articles and a video are included in the reference list below. Interested readers may contact me directly for PDF copies of the articles. Three editions of my recent book series, *Marketing FAME*, are included as well (i.e., Martin, 2017b, 2017c, 2019b); they address many aspects of CLM and CLBB using a "this day in history" approach to point out potential windows of marketing opportunity that arise throughout the annual calendar cycle. Beyond their interest in CLM and CLBB, *per se*, marketing history buffs may appreciate the other content in these books too. Sample excerpts of the books may be found on the book series' website, www.MarketingMarbles.com

Of course, I'm not the only scholar or practitioner who's taken an interest in CLM and CLBB. Scott Dacko and his colleagues have also written extensively on time and timing issues in marketing – including his 2012 award-winning "Time-of-Day Services Marketing" article that focuses on the daily calendar cycle. Although not limited to marketing-relevant phenomena, Daniel Pink's recent book "*When*" (2019) also takes a close look at the daily cycle, among other calendar-related issues. Other highly relevant research by Hengchen Dai and colleagues (2015) scrutinizes the role that calendar "temporal landmarks" play. Their research has clear marketing implications for the timing of goal-setting, planning and buyer motivation. For readers interested more generally in American consumers' use of time, the work of John Robinson and his colleagues is a "must" read (e.g., see Robinson and Godbey, 2008). Finally, although not limited solely to marketing implications, readers interested in the potency that the weekly cycle exerts on human behavior should read Eviatar Zerubavel's incredibly rich book, *The Seven Day Circle* (1985). Of course, these are only a few of many sources of additional information. Interested readers should also follow-up and read the numerous sources cited in the reference lists of the publications mentioned.

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