Diagnosis of strategic planning for commercial companies in ciudad Obregon, Sonora

Diagnóstico de planeación estratégica para empresas comerciales de ciudad Obregón, Sonora

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Abstract

This study consists in elaborate a diagnosis of strategic planning for SMEs in the commercial sector of Ciudad Obregón, Sonora, answering the question posed: How to contribute to the improvement of the organizational performance of SMEs in the locality? The established objective is to carry out a diagnosis of strategic planning for SMEs in Ciudad Obregón, Sonora based on obtaining information through the application of an instrument, with the purpose of generating proposals that contribute to the improvement of their organizational performance, increasing their probabilities of permanence in the market. The research is qualitative and descriptive, designing an instrument to diagnose strategic planning for five SMEs in the commercial sector. Finding mainly lack of strategic planning and to perform the analysis of the environment, both internal and external, it can be said that they have no accurate knowledge of these, causing uncertainty. Concluding that it is vital that every company has a strategic planning, because when planning and organizing work, it becomes less difficult (Aguilar, 2000); and by continually evaluating strategies, they prevent them from becoming obsolete, in addition, this contributes to the objectives and strategies being established in a coordinated and conscious way, avoiding bad decisions (David, 2003, cited by Valdez, Zerón and Morales, 2008).

Strategy, Strategic Planning, SMEs

Resumen

Este estudio consiste en elaborar un diagnóstico de planeación estratégica a SMEs del sector comercial de Ciudad Obregón, Sonora, responder la interrogante planteada: ¿Cómo contribuir al mejoramiento del desempeño organizacional de SMEs de la localidad? El objetivo establecido es realizar un diagnóstico de planeación estratégica a PyMEs de Ciudad Obregón, Sonora con base en obtención de información a través de aplicar un instrumento, con la finalidad de generar propuestas que contribuyan al mejoramiento de su desempeño organizacional, aumentando sus probabilidades de permanencia en el mercado. La investigación es cualitativa y descriptiva, diseñando un instrumento para diagnosticar la planeación estratégica a cinco SMEs del sector comercial. Encontrando principalmente carencia de planeación estratégica y al efectuar el análisis del entorno, tanto interno como externo, se puede decir que no tienen conocimiento certero de éstos, originando incertidumbre. Concluyendo que es vital que toda empresa cuente con una planeación estratégica, debido que al planear y organizar el trabajo, éste se vuelve menos difícil (Aguilar, 2000); y al evaluar continuamente estrategias, se evita que éstas se vuelvan obsoletas, además, esto contribuye a que objetivos y estrategias estén establecidas coordinada y conscientemente, evitando malas decisiones (David, 2003, citado por Valdez, Zerón y Morales, 2008).

Estrategia, Planeación Estratégica, PyMes

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Background

Cleri (2007) says that the first strategists were general who planned the actions, development of skills and effective use of resources to kill their enemies and it is from the Middle Ages that the monarchs plan diplomatic relations to defend themselves or add territories, later it was used in the political sphere and later it was applied in the business world, where it was initially used in numerical matters, then in strategic planning and finally in strategic management. The author mentions that initially what was done was to establish fixed rules, project from top to bottom and in the end a manual was written where behaviors and actions were established. Currently, it is a discipline that the author describes as "prospective, inquisitive, creative, demanding, democratic, projective and flexible". For its part, Aguilar (2000) states that after the Second World War, strategic planning is considered the most common administrative tool used by successful companies in the United States because, in addition to taking into account both the short and long term it offers answers to an uncertain and constantly changing future.

In addition, the author cites Steiner (1998), who assures that it was first used in commercial companies in the mid-1950s, known in those years as "long-term planning" prevailing this term during the sixties, however, In these same years, "complete corporate planning", "complete management planning", "total general planning", "complete integrated planning" began to be used as synonyms for this term, until what is now known as "strategic planning". Despite the above, it is up to recent dates that the strategy is recognized as a key factor of success in organizations.

In turn, Sánchez (2003) ensures that the first strategic planning school arose at Harvard University, where a scheme focused on the concept of strategy was developed and serves to analyze cases and experiences of companies. On the other hand, Clímaco (2012) asserts that strategic planning is a product of the twentieth century showing that he has always been concerned about change, he must fulfill three basic functions, the diagnosis and detection of strengths and weaknesses in his work, with the purpose to apply corrective measures to minimize deficiencies; all this based on the knowledge of the environment.

Thus, it can be said that strategic planning covers the need for guidance or guidance for any organization regardless of the sector to which it belongs, the activity that it performs or its size, since it establishes what it is desired to be and achieve for the future, as well as how to achieve it.

Problem Statement

SMEs have great importance in the development of countries. Del Ángel (2016) states that in Mexico 97% of companies are small or medium, generate 80% of the population's employment and generate 36% of the Gross Domestic Product, which according to the author is sufficient reason to attend and support these types of companies since they are the basis of the Mexican economy.

On the other hand, Estrada, García and Sánchez (2009) assure that numerous investigations have indicated that the majority of SMEs do not plan, not knowing the reason why they do not; what causes that these organizations cannot develop their growth and yield potential, thus risking their permanence and stability in the market. These authors assert that a determining factor in the performance of companies lies in the existence or lack of strategic planning. Due to the above, the ideal is that any organization, regardless of its turn, size or specific characteristics, performs strategic planning.

Reinforcing the above, Cleri (2007, pp. 88) ensures that "not having a strategy condemns to be slaves to the plans of others; in addition, not knowing where to go or not choosing a precise path will lead anywhere," and adds that the success of a company depends on choosing a correct strategy and implementing it properly.

In addition to what was mentioned by these authors, in the study carried out by Castaño (2010), it is concluded that businessmen implement strategic planning in an informal and intuitive way, in addition to depending on their emotions and personality. What creates an uncertain future for this type of business, due to the lack of commercial and administrative training of those in charge of the SMEs, coupled with the lack of timely information; putting your survival and chance of success at serious risk.

For his part, López (2005) performs in his research an analysis and comparison of empirical results on the relationship between strategic planning and performance and concludes that about half of the total research that has analyzed strategic planning and its impact on performance. In SMEs, they show a positive relationship between these variables. He claims to have found among the investigated authors who affirm that the businesses that apply strategic planning as a management tool have a better performance than those that do not use it.

But, despite this, he also discovered other empirical studies that raise questions about the impact of strategic planning on the financial performance of organizations; considering that this difference between the information found lies in having included companies of different sizes in the study, a lack of unification of the criteria to operationalize strategic planning and performance, in addition to the application of different models of the planning process that do not. They are adaptable to small and medium-sized businesses, adding that these differences may also be due to the fact that the information found was obtained from research carried out in both developed and underdeveloped countries, emphasizing that there is a lack of studies in the latter type of countries. The author concludes that "strategic planning motivates future thinking, reduces attention to operational details, and provides meaning to identify and evaluate strategic alternatives that improve performance." For this reason, it is recommended that it be widely considered by managers, regardless of the degree of formality with which the strategies are carried out and although it is not in writing.

In addition, López (2005) states that factors corresponding to attitudes and behavior can influence the relationship between planning and performance and are generally not considered in the literature, so he assures that strategic planning is not the only variable with influence on business performance, but is part of a series of factors that improve performance and help companies achieve their goals and grow quickly and in a controlled manner.

On the other hand, Valdéz, Zerón and Morales (2008) mention that when talking about strategic planning, an immediate relationship is made with large companies, as if it were exclusively used by this type of organizations.

These authors affirm that, according to Anzola (2002), SMEs usually consider strategic planning as a waste of time, because their daily operations absorb most of their time; which does not allow tools to be implemented in this type of companies that allow them to grow or at least survive in a competitive and changing environment, being able to be left behind technologically leaving them at a disadvantage compared to medium and large companies.

This environment, as commented by Cleri (2007) is not easy to cope with for most SMEs due to scenarios that change abruptly and are highly competitive. It also states that many of the problems of SMEs are due to the lack of a clearly established strategy that indicates where to go defining the direction to follow.

Based on the above, the following question arises: How to contribute to the improvement of the organizational performance of the local SMEs?

Objective

Make a strategic planning diagnosis to SMEs of Ciudad Obregón, Sonora based on obtaining information through the application of the designed instrument, in order to generate proposals that contribute to the improvement of their organizational performance, thus increasing their chances of permanence in the market.

Justification

According to data presented by Valdéz, Zerón and Morales (2008) 97% of companies that fail are due to poor administration, which includes planning, to which Sánchez (2003) adds that according to the characteristics of the planning process and the strategies formulated will be the results obtained in the company, so it is necessary for the entrepreneur to analyze and investigate the current situation of his company, what he wants to achieve as well as what he needs to do to achieve it.

On the other hand, Barreiros (2012) conducts a study in a company dedicated to the purchase and sale and distribution of motorized units, with the purpose of designing tools necessary to efficiently and effectively carry out all the activities of the organization, up to achieve excellence in business quality; and affirms that through strategic planning we obtain “a frame of reference for the organizational activity that can lead to a better functioning”. Likewise, it asserts that it is important that managers define the company's mission in order to provide guidance for their activities, functioning better and becoming more sensitive to an environment of constant change.

It also ensures that the success of strategic planning is in the power of anticipation, initiative and timely reaction of change, as well as the support provided by senior officials and employees, constantly planning their activities, without improvisation, obtaining as a result the establishment of organizational objectives and the appropriate procedures to achieve them.

One more benefit that strategic planning provides is that by putting it into practice, and also considering the quality of service because it is an important part of business success, customers will choose the company not only for its product, service or price, but for the treatment they receive from her.

Failure to carry out strategic planning in a company can give rise to serious problems, such as not having clearly defined strategies, which in turn will cause the mission and organizational objectives not to be fulfilled, in addition to minimizing both weaknesses and threats that can affect the company, as well as maximize the strengths and opportunities that arise in the environment.

Similarly, not having a plan to review and feedback what happens in the organization, whether with the product, market, competition, among others, can cause problems of uncontrolled growth, resulting in erroneously calculating the supply of resources being able to present excess or shortage of these (Valdéz, Zerón and Morales, 2008).

Likewise, it is important and necessary to specify, as the authors mention, that strategic planning is not the solution to all the problems that companies present, but it is a tool that can provide enough benefits if it is used at the time and in the required form, in addition to contributing to the strengthening of the national economic structure also contributes to the improvement of business performance.

In addition, adequate strategic planning, as mentioned by Cantillo and Gutiérrez (2015), places the company in a context in a reasonable and relevant way, promotes fundamental aspects in the administration so that organizations can adapt to changing environmental conditions, and in the future, manage eventualities more effectively.

Theoretical foundation Strategy

For Cleri (2007), as for Aguilar (2000), the word strategy comes from the Greek "strategy" which means "to send the troops", "the art or science of being general"; and conceptualizes it as “the art of planning courses of action to drive the forces of the organization towards a specific objective within a period”, for which its resources, skills, weaknesses, and according to the environment and / or circumstances, risks and opportunities that may arise. He adds that “the strategy is to choose one option and discard others”.

In turn, Valdéz, Zerón and Morales (2008), affirm that the strategy determines the functions that must be carried out to achieve the organizational objective since it provides the way to follow for carrying out these functions and when there is no strategy defined, the behavior in the company is “incongruous and sometimes even chaotic” since it is not defined what you want to achieve or the direction to follow.

On the other hand, Cantillo and Gutiérrez (2015) affirm that the strategy is a way to establish the organizational proposal in the form of long-term objectives, as well as the action programs and the priority in the allocation of resources, which leads to defining the competitive environment of the company, in addition to responding to opportunities and threats considering the strengths and weaknesses of the organization.

For Carneiro (2010), the strategy is to guide the future, establish an end, within an acceptable period of compliance towards which to guide the direction of the company.

So it can be said that the strategy is the course of action that must be followed to achieve the objectives set by the organization, taking into account the strengths and weaknesses of the company.

Strategic planning

Sanchez (2003) ensures that strategic planning is a management tool that aims to modernize the company and contains leadership, organizational knowledge, competition, firm building and strategy formulation, and adds that In order for it to be carried out properly, it is necessary to have information on the current situation of the company, both internal and external, to identify all the options available to obtain the desired results, contributing to the improvement of decision-making.

For their part, Valdéz, Zerón and Morales (2008) state that strategic planning is intended to facilitate the development of organizations, being useful to establish with greater accuracy the current situation of these, what they want to achieve and what They need to do to reach it. And for Martínez (1994) cited by Aguilar (2000), strategic planning is an orderly evolution between the current situation that a company presents and the one it wishes to have in the future.

The strategic planning, for Lema (2004), is a complex process that includes from the enunciation of the mission, vision and values of the organization, the analysis of investigations of both the internal and external environment of the company and the establishment of possible scenarios of the future reality until the elaboration of the strategies, objectives and actions that help to materialize and make the established strategy tangible, operational, controllable and measurable.

Likewise, for Barreiros (2012), strategic planning is “a tool for companies, which helps determine future goals, for which objectives and activities to be fulfilled by all members of the organization must be developed”.

On the other hand, Gutiérrez (2019) states in his research that strategic planning must be considered of utmost importance by companies because it establishes the course to follow, as well as the objectives to be achieved. It also provides organizations with tools for evaluation and monitoring of results, thereby facilitating the detection of areas of opportunity and continuous improvement of their processes, which in turn contributes to economic, human or technological organizational growth.

In addition to the above, Gaitán and Ramírez (2018) ensure that strategic planning is vitally important within an organization, since it is through it that the company can be directed and projected into the future, analyzing its internal and external environment in order to determine the current business situation and set the course to take.

Therefore, after the analysis of the concepts provided by the authors mentioned above, it can be affirmed that strategic planning must be a constant practice for organizations, contributing to an improvement in decision making due to the more accurate knowledge of the actual situation of the company, what you want to achieve and what is necessary to achieve it.

SMEs

For Nuño (2012), the size of a company in Mexico as of June 30, 2009, is determined based on the total number of staff in the organization and the level of its annual sales, so it mentions that companies considered as Small commercial companies have between 11 and 30 employees, and annual sales of four to one hundred million pesos. Small industrial or service companies have 11 to 50 workers, and sales of four to one hundred million pesos annually. It also mentions that a medium-sized commercial organization is one that has between 31 and 100 employees with sales between 100 and 250 million pesos per year; in turn, the medium-sized service company is the one with 51 to 100 employees and sells between 100 and 250 million pesos a year. For its part, the medium-sized industrial company is the one that gathers between 51 and 100 workers presenting annual sales between 100 and 250 million pesos.

This same characterization is presented by Saavedra and Loé (2018), adding only the information of the micro enterprises, which are those that have up to 10 employees and present sales per year for up to four million pesos.

On the other hand, the Ministry of Economy (2019), asserts that small businesses, in addition to meeting the characteristics mentioned by the previous authors, are independent entities, created to be profitable and their objective is to produce, transform and / or provide services to satisfy specific needs and desires that exist in society; they represent more than three percent of the total of companies in Mexico and almost 15 percent of the employment in the country, in addition, they produce more than 14 percent of the Gross Domestic Product.

Regarding medium-sized companies, he affirms that "they are economic units with the opportunity to develop their competitiveness based on the improvement of their organization and processes, as well as improving their business skills." In addition to the characteristics mentioned by the previous authors, he adds that they have a level of complexity in terms of coordination and control, considering among their staff, those who may occupy functions of coordination, control and decision; they represent almost one percent of Mexican companies and generate almost 17 percent of employment; In addition to providing more than 22 percent of the Gross Domestic Product.

On the other hand, Del Ángel (2016) provides the advantages that SMEs can present among which are their dynamism, their growth opportunities, being job-generating and their easy adaptation to new technologies that they use to incorporate into their processes. The disadvantages they may have is that sometimes they do not reinvest their profits to improve equipment and production processes; few times their staff is specialized, and they provide little training, they have few or no quality control systems, which can generate poor quality in their products and / or services. In studies carried out by Braidot, Formento and Nicolini (2006), the authors state that it is difficult to know why these types of organizations do not implement strategies related to innovation, total quality management and formalization of their management practices.

Therefore, providing a unique concept of SMEs is complex, considering various factors to do so, such as the number of employees, the productive sector to which they belong, the amount of sales per year, among others.

Method

This research is of a qualitative and descriptive approach, where an instrument designed to make the strategic planning diagnosis was applied to each of the organizations under study.

Subjects of study

This research was carried out in five SMEs belonging to the commercial sector of Ciudad Obregón, Sonora, Mexico that were willing to be part of the study. Two of them are organizations dedicated to the sale of seafood, one founded just a year and a half ago and the second one has been in operation since 2006.

The other SME is an establishment that sells coffee and food products, founded in 2015; one more that offers equipment for information technology solutions since 1992; and the last one, sells wedding dresses, accessories and accessories for them, all imported from the United States and Europe, began operations in 2014.

Instruments

An instrument divided into four sections was designed to obtain information about the characteristics of each participating SME and to make the strategic planning diagnosis to each of them.

These sections are:

- a) the characterization of the SME with 19 reagents, where it is questioned from the name of the organization, the date of commencement of operation, location, turn, size, level of schooling of the owner and employees, to their background.
- b) Obtaining information about the philosophical platform of the organization with 28 questions, questioning whether the company has established the vision, mission, objectives and values, and if the above is known to employees.

- c) The analysis of the external environment with 44 questions, asking questions about economic, technological, cultural and social, natural, political and legal factors; and, d) that of the analysis of the internal environment with 42 questions, which include questions about factors such as organizational structure, market, finance and production.

Process

The process to follow was:

1. Contact the local SMEs in order to publicize the research project and thus identify which of them were interested in being part of the study sample.
2. Design the instrument for the characterization and diagnosis of the strategic planning of each of the SMEs participating in the study.
3. Apply the designed instrument to each of the SMEs under study.
4. Perform the analysis of the results obtained with the application of the instrument.
5. Prepare recommendations for each of the participating SMEs.
6. Prepare the diagnostic report for each of the organizations.
7. Presentation of results to entrepreneurs.

Results

When making preliminary contact with the local SMEs, it was determined that the companies that showed interest in participating in the research project were five companies from the commercial sector, six from the industrial sector and four from the service sector; presenting in this document only the results obtained from the SMEs belonging to the commercial sector.

In the information of the characterization of the SMEs, it was found that two of them have an operating time of three to five years, one of them has only between 1 and 3 years of operation, one more has 10 to 15 years, and another that has more than 20 of existence; In addition, four of these companies are considered family because at least two of the members of the same family work in them.

Of these five organizations, four claimed to have the vision and mission, but despite having it defined, only two of them have made them known to their employees, indicating that despite having these types of plans, if these They are not known by the workers, there can be no sense of belonging to the organization, nor can there be a guide or orientation in their activities, hindering the response to the changing environment, as Barreiros (2012) states.

On the other hand, all these SMEs claim to have their objectives established in writing, stating that these are fully met in addition to being known by the employees. Regarding organizational values, all the companies under study claim to have them formally instituted, but one of them has not made them known to its workers.

When analyzing the external environment, evaluating the influence, whether positive or negative that the economic, technological, social, political and legal factors have on each of the SMEs studied, the main findings were: that all businesses have identified to its competition, the strategies that this one manages, and they assure to have the control of the prices. Analyzing the economic and technological factor, all the companies responded that the changes in both affected them and four of them affirmed that they have the capacity to face the technological changes that are presented to them, although only two of them consider having better technology than your competition In addition to the above, four of the businesses said they measured the degree of customer satisfaction, which contributes to improving the quality of the service offered. In addition, when asked about the performance of socially responsible actions, only one of them claimed to practice them. Among the actions carried out is having a scholarship program for employees and family members, caring for the environment, recycling program, and also having a program to reduce energy and water consumption.

So it can be deduced, based on the previous results, that these organizations know their competence and the way in which it acts, as well as their situation before the technological changes that are presented, and the degree of satisfaction of their customers, which gives them an advantage to respond to possible situations or unforeseen events that may arise.

Analyzing the natural, social and cultural factors of the external environment, four of the companies studied mentioned having been affected by the shortage of raw material, high pollution rates, changes in the values, perceptions, preferences or behaviors of customers, as well as your level of education and income. At the same time, in the political and legal factors, two of the companies claimed to have been affected by changes in the application of the law and three more assured that they have been affected by the political environment that the country is currently living.

Within the analysis of the internal environment of these organizations, it was obtained as a result that three of them do not have an established organizational chart, and the two that do have it, do not have it updated, therefore, the changes that have occurred in Its organizational structure has not been reflected in these organizational charts. Similarly, when asked about the existence of administrative manuals, three of them said they did not have any of them and the two who said they had them have an organization and procedures manual, only one has an induction manual.

Four of these businesses assert that the organizational structure they have allows them to react quickly to the situations that are presented to them, associated with the fact that they consider that the strategies they currently have work, being these market, price and promotion strategies. As for distribution strategies, three of them say they don't have them established.

The totality of organizations studied, ensures that they have good communication with their clients, that their prices are competitive, that they have the ability to grow and adapt to changes quickly, but, four of them report not having defined their chain of value.

The personnel of these businesses are qualified to perform the tasks entrusted correctly, and four of these organizations assured to provide training to their employees at least once a year. Regarding the financial factor, four of the companies claim to make financial plans and consider having economic potential; also three of them ensure that there has been a favorable evolution in the profits of their businesses.

All of the above is part of the diagnosis of the strategic planning made to the five SMEs of the commercial sector studied; which was delivered to each of the businessmen formally and in writing in a report, in addition to making a presentation of it that includes recommendations for each organization, all this in order to clear any doubts that may arise from the work done and continue this study.

Conclusions and recommendations

Contreras (2013) ensures that all organizations require strategic planning, which will guide them, establishing objectives that are the result of internal and external analysis. By establishing the scope, what you want to be and achieve, as well as the rationale of the company, you will be able to establish the necessary strategies to achieve the above, which will provide clarity to the decision makers of the organization so that they have clarity in the type of strategies to be used and how to appropriate them to the different alternatives that will arise as the company grows and / or is positioned in the market.

Therefore, once the analysis of the information collected through the instruments applied to the organizations under study is concluded, it can be said that most of these companies have basic elements of the philosophical platform, of their organizational structure and have identified Its competition also has notions of its external environment, which gives it some stability in the market. Despite the above, it is recommended that each of the SMEs make the pertinent changes to their philosophical platform (vision, mission, objectives and values), making the adjustments and updates indicated directly to each of them.

In addition to the above and based on the diagnosis obtained, the recommendation is also made to prepare the SWOT analysis and the design of the matrix corresponding to said analysis where the strategies to be followed by each of the organizations are established. Likewise, the value chain, the Balance Score Card and the Strategic Map must be designed for each SME, as well as recommended by Galán and Pérez (2019) in their research, since by having all of the above, indicators can be established with the which progress can be measured towards the established strategies and objectives.

In addition to this, it is also suggested that a proposal for the strategic planning implementation process be developed, designed individually based on the specific findings found for each of the companies studied.

In the same way, it is important that each of the SMEs give continuity to the present investigation, implementing the strategic planning that is designed for them, since as Vasquez (2002) assures a strategic planning must be implemented, that being the only way to avoid there is a failure to achieve the expected results. To which Aguilar (2000), reinforces arguing that "the success or failure of Mexican organizations depends on the quality and capacity of those who manage and direct them but above all on the understanding, mastery and proper application of methodologies such as strategic planning". Therefore, carrying out such implementation will provide SMEs with competitive advantage, solidity and greater opportunity to remain in the market, while preventing current strategies from becoming obsolete.

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