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Strategic Planning for Collegiate Athletics

R Henry Migliore

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STRATEGIC PLAN

FOR collegiate
athletics



R. HENRY MIGLIORE, Ph.D.

STRATEGIC PLANNING FOR COLLEGIATE ATHLETICS

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STRATEGIC PLAN FOR ATHLETICS

PLANNING FOR THE FUTURE

Do you ever feel like circling the wagons and doubling the night watch? What happened to the “good old days” in college athletics? Let that thought flush through your spirit one last time. The best defense is a good offensive. College athletics is an industry. Ask anyone in the computer and petroleum industry what they have been through the past decade . . . change. The “good old days” are gone forever. The key now is adaptation to change. The planning process provides a structure for strategic thinking and thus successful responses to a changing environment.

Many athletic departments are struggling to succeed. For some, survival is the issue. For sure, every university and college with athletic programs is looking for ways to adapt to a changing environment.

Good strategy must be turned into coordinated action. Here is a planning philosophy and process that can assist college athletics.

It is difficult to take a trip without selecting viable routes, stopovers, and means of travel. Taking a journey into the athletic world without a viable plan can be both hazardous and confusing. However, a well-developed, long-range strategic plan can provide the milestones by which progress can be judged and needed corrections made. Here is an outline of 10 steps to a strategic planning process designed to help you focus on future growth. It helps you concentrate on problems and long-term solutions.

Any athletic department can learn to plan for both the expected and the unexpected by implementing a strategic planning and management process that includes the following:

1. Preparing a statement of purpose: summarizing what it does, where it does it, how, and for whom.
2. Monitoring the environment in which it operates.
3. Realistically assessing its strengths and weaknesses.
4. Making assumptions about factors that affect it, but over which it has no control, e.g. demographics and other factors.
5. Establishing objectives tailored to the department’s purpose.
6. Develop strategies to meet the objectives.
7. Making and implementing step-by-step, long and short-term operating plans.
8. Evaluating performance to ensure objectives are being met. Make sure athletic program is being properly monitored and is in compliance with all laws and NCAA regulations.
9. Reevaluating purpose, environment, strengths, weaknesses, and assumptions before setting objectives for the next performance year.
10. Rewarding performance.

This 10-step process fosters a planning mentality. Completing it yields a product: a strategic plan to guide the athletic operations. Managing with a strategic plan is a learned art. The longer you use it, the better you are able to manage with it.

MODEL OF PLANNING PROCESS

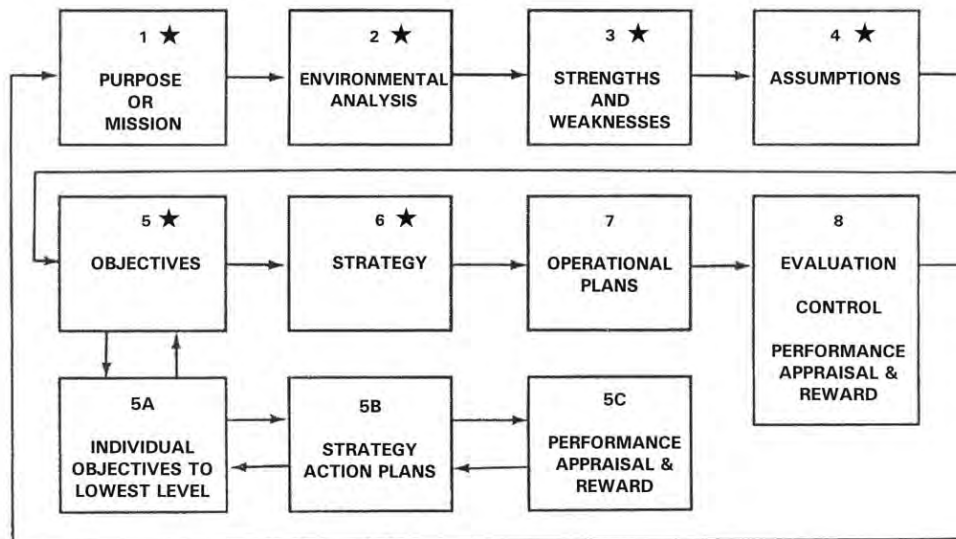


Figure 1

We did a study of 138 intercollegiate athletic programs to determine the extent of use of strategic planning. (1) We found that those athletic departments with a written statement of purpose or mission have the highest likelihood of success. Departments with objectives in key result areas, involvement of people, and review of performance were more likely to be successful. Appendix A has the details of the study. We concluded that planning is the inescapable first step for long-term success.

STATEMENT OF PURPOSE

The first step is to define your athletic department's purpose or reason for being. Underlying your purpose statement may be goals for revenue generated, attendance by sport, graduation rates, wins, championships, etc. All members of the athletic department have to understand and agree on the department's purpose; otherwise, everyone will be pulling in different directions.

Here is an example of a purpose statement, from the University of Notre Dame:

Notre Dame will endeavor to maintain a high quality, competitive athletic program consistent with its heritage. If and when problems arise, public accountability will be given consistently, with principles of justice and due process.

The total athletic program of the University will generate sufficient funds to be self-supporting. This should never be done to the detriment of the integrity of the institution or its identifiable priorities. There will be no booster clubs or other such entities outside

of the direct control of the athletic department. The annual operating budget and the ongoing financial activities of the athletic department will be subject to the same review and approval process as are all other operating units of the University.

A full athletic program, consistent with the financial resources available, and the overall academic program of the University, will be provided for men and women student athletes.

Coaches and athletic department personnel will, as far as possible, reflect the racial, ethnic, and gender diversity of both the broader University community and society at large.

Nonvarsity athletics will be provided sufficient support to enable every student to have the opportunity to participate in some form of organized athletic activity.

Conclusion: In sum, as an institution we will pursue a standard of achievement in athletics consistent with our overall purposes as a University. We will attempt to excel in every form of intercollegiate athletics, but not at the price of distorting our primary role as educators and moral guides. If we discover instances of misjudgment or abuse, we will strive speedily to rectify the situation.

Francis J. Bridges and Libby L. Roguemore state, "Planning is not the only factor that directly affects the success or failure of an organization, but planning does represent the first and most important step in achieving future organizational goals, objectives, and ultimate success. (1)

We remain confident that Notre Dame and other institutions with similar values and goals can lead the way and shape a worthy standard for the special enterprise of intercollegiate athletics. (2)

A few other points from the University of Notre Dame's "Statement of Intercollegiate Athletics" describe what is suggested in a purpose/mission statement:

1. We are a University dedicated to the mission of providing the highest quality education for all of our students.
2. Coaches are primarily teachers. They share with members of the faculty the responsibility to educate and train the students entrusted to them.
3. The student athlete is first of all a student. Each one is held to the same general standard of conduct as any other student.

Ted Leland, Athletic Director at Stanford University, emphasizes the value of the purpose/mission statement: "You have to have a personal philosophy and a departmental philosophy that you can stand behind when you are faced with this incredible level of uncertainty and incongruity regarding your goals and how your resources should be spent. . . . The key is to have a core mission statement to measure your day-to-day decisions against." (3)

Appendix B has examples of purpose statements, environmental factors, objectives, and strategies.

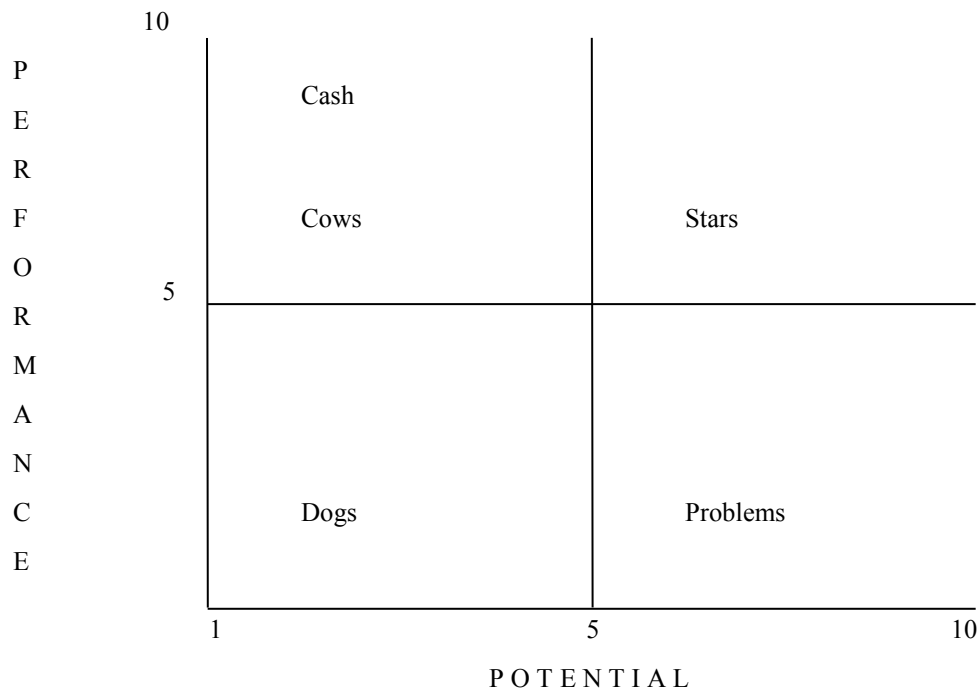
MONITORING THE ENVIRONMENT

The plans and activities of athletic departments are influenced by a host of obvious environmental factors. However, less obvious external factors could push your department off its planned course. Some examples of environmental factors facing athletics are changing legislation, bowl game TV ratings down, and conference reorganizations. An example is the trend in attendance at NCAA college games and the new rules proposed this year on academic purpose.

Another example of an environmental factor is the addition of a professional sports franchises in the university population area. An example is the Baltimore Ravens NFL football franchises in Maryland. This is competition for the Maryland football program. Economic trends, population demographics, television, and the Internet are all factors to be considered.

ASSESSING STRENGTHS AND WEAKNESSES

After identifying your purpose and scouting out the environment, it's time to assess your department's strengths and weaknesses. Some of the areas normally analyzed are buildings, programs, facilities, computers, people skills, cash flow, etc.



This basic evaluation tool can help an organization evaluate a wide range of things. The athletic department can evaluate each individual sport, promotions, marketing, etc.

DEVELOPING ASSUMPTIONS

The fourth stage is to develop major assumptions. These should be made about spheres over which you have little or no control, i.e. factors external to your athletic department. An assumption might be the continued growth in population in the area.

SETTING OBJECTIVES

Any athletic department can ensure that it's moving in the right direction by establishing a set of clearly defined, measurable objectives. Your objectives are the targets. They should be directed toward maximizing strengths and minimizing weaknesses.

By putting objectives down on paper and asking each employee to do the same, you can generate discussion that leads to a "performance contract," or a personal commitment to achieving those objectives, which should be reviewed and updated each month, if necessary.

It's a good idea to set objectives for the following:

1. Revenue by sport
2. Championships
3. Wins/losses
4. Graduation Rate
5. Game attendance by sport
6. Budget
7. Community Service

Here are examples of short-term objectives in place for an athletic department:

1. Generate total revenue for football of \$6.2 million.
2. Win two NCAA championships and six conference championships.
3. Win 20 plus games in basketball.
4. Attain a 90% graduation rate.
5. Attain an average attendance for baseball of 3,900 fans per game.
6. Operate within a budget.
7. Sponsor five community support projects.

See Appendix B for examples of more objectives.

CREATING STRATEGIES

At this juncture, it is time to create the strategies to help you reach your objectives. Objectives are the ends; strategies are the means.

Each strategy must be evaluated in light of current and prospective external factors—the department's strengths and weaknesses, changes in the marketplace, and competition. For example, at University of Oklahoma the October 2005 football games will be placed at Arrowhead Stadium in Kansas City.

DEVELOPING OPERATIONAL PLANS

Once targets (or objectives) are set and strategies for meeting them outlined, it is time to develop both long and short-term operating plans. Don't confuse objectives, strategy, and the operational plan. The objective is the target. The strategy is the proposed means. The operating plan is the action phase. Here you hire, fire, build, promote, and so on. Note Appendix C on how to develop the marketing plan. Appendix D has a research questionnaire to determine how fans (your customers) feel about your product. It also includes a survey instrument for recruiting athletes.

FINANCIAL PLAN/BUDGETS

The effective use of financial resources is one of the cornerstones to a successful athletic operation. Every facet of the program must have a well-planned and realistic budget. An attempt must be made to live within the budget, although flexibility with changing circumstances is allowable.

A business and financial section should be set up and relied upon to insure proper control and reporting of expenditures. A tight knit financial system will insure proper use of this important and necessary resource. Again, flexibility is the key, both for budget and control.

The yearly budget is set to meet the first-year plan of the overall five-year plan. Each support unit/department develops a plan, and the budget to execute it.

MONITORING PERFORMANCE

The final step is to monitor performance to make sure that objectives are being met. Any deviations from expected results must be identified as quickly as possible and corrective action must be taken. Indeed, failure to achieve a stated target should not be overlooked, as this could lead to a breakdown in the overall plan.

It is important to ask yourself these selected types of questions:

- % To what degree did actual performance hit or miss the mark?
- % Did attainment of the goals support the overall athletic department's purpose?
- % Has a change in the environment warranted changing the purpose, objectives, and strategies?
- % Have additional strengths and/or weaknesses been revealed that require changes in the plan?
- % Have athletic department employees been rewarded for achieving what they set out to do?
- % Is there value placed on providing people with regular feedback that will help reach their goals?
- % If there is a failure to reach an objective, has the reason for failure been identified and corrected?
- % Do you have a standard philosophy and procedure regarding how to handle problems?

A frequent citation from the NCAA often mentioned is "the need for more emphasis on the control and monitoring of its program". A reasonable question is "How do you keep the ship (athletic department) headed in the right direction in turbulent seas, with icebergs everywhere, and the wind changing constantly?"

REEVALUATE

At the end of the performance year, and as part of planning for the next year, the purpose, environment, strengths, weaknesses, and assumptions of your department must be re-evaluated.

After all, just having a plan doesn't ensure success. Only those athletic departments that continually evaluate their progress in a changing marketplace will thrive. Preparing for the future requires a commitment to improving your management practices now. Our suggestion is to do this during the late spring or early summer. If possible, off site where the athletic staff can deliberate without interruptions.

REWARD PERFORMANCE

Finally, reward performance. Use a system of bonuses. Pay for performance. Recent court rulings on equal pay make this an even more important topic for this decade. The University of Oklahoma just recently approved bonuses equal to one month's pay for the football and baseball coaching staffs. Texas Tech has a bonus system if student athlete graduation rates are met. What about considering a bonus system that includes wins, graduation rates, class attendance, etc?

Note the recent bonus incentive for John Cooper, Ohio State; Steve S. Purrier, Florida; and Bobby Bowden, Florida State. (4) Their bonuses will range from \$35,000 to \$70,000 for bowl appearances. The old saying goes, "You get what you reward." We believe a bonus pool for everyone involved in the athletic department is appropriate. Graduation rates, class attendance, coach, staff, student athlete involvement in the community could all be tied to a reward system. Another interesting twist would be that the coach's bonus is based on a minimum GPA, class attendance, and graduation rate.

TEAMWORK

The strategic planning process promotes teamwork. Vince Lombardi was quoted as saying "a team needs to love each other". The same holds true for the athletic department "team". Our observation, after years of taking a wide range of corporate, church, education, and nonprofit groups on planning retreats, is that the retreat itself is a valuable experience. It is often the beginning of a shared perspective among the staff related to their challenges and goals.

SUPPORT PLANS

After the overall athletic department strategic plan is developed and approved, each major group develops a support plan. The support plan includes fund raising, football, baseball, etc. Also included are plans for marketing, public relations, and fundraising.

Each support plan is shared with the entire athletic department staff and coaches. The key here is coordination and communication. We see a lack of coordination and communication in many athletic departments. The right hand doesn't know what the left hand is doing. In my playing days, I knew what to do on every play, and I knew what my teammates were doing.

CONCLUSIONS

Why leave the success and survival of an athletic department to chance? A well designed throughout plan with problems identified and a united course of action can help. It's no guarantee for success, but it can cut the chances of failure. The worst-case scenario is managing year-to-year and/or season-to-season. The recommended focus is out three to five years. Then make sure the yearly plan is a step toward the longer-range plan.

Our experience is that everyone involved with the athletic department will enjoy and become invigorated with a well-organized planning activity. Coaches, staff, everyone likes to be "in on the action." There is no greater compliment than to ask someone sincerely what they think about a given subject. The old axiom "those that execute the plan need to be in on the plan" holds true.

The plan is more likely to succeed if everyone has had input. The modern term is "empowerment." Everyone is going to buy into the plan if they were part of it. Support plans for every area in athletic department support the overall plan. Planning doesn't guarantee success but can cut the chances for failure. Anticipating a problem with a predetermined course of action is better than facing it right out of the blue.

APPENDIX A

RESULTS OF STUDY OF ATHLETIC DEPARTMENTS

RESULTS OF STUDY OF ATHLETIC DEPARTMENTS

We completed a study a few years ago on the use of strategic planning in intercollegiate athletics: "The Effect and Usage of Strategic Planning in Intercollegiate Athletic Departments in American Colleges and Universities." (5) The purpose was to determine the level of usage of strategic planning in Intercollegiate Athletics and the effect that planning has on the results of competition.

It was conducted by a random sampling of athletic directors who are members of the National Association of Collegiate Directors of Athletics. A questionnaire was mailed to 300 potential participants. One hundred thirty-eight were returned. The departments completely involved in strategic planning reported better results. These results held true for all classifications of study including review by division and by geographic region. In addition, all the strategic planning variables showed a positive relationship with results.

The most important predictor of results was the purpose statement. Ninety-three percent of all the schools that reported excellent results had a clearly written statement of purpose. Other predictors of success included the depth of environmental analysis, the depth of assessing strengths and weaknesses, the method of selecting a competitive strategy, and the management system used by the athletic department.

Better results are achieved when a formal system of strategic planning is implemented to guide the expended energies of the athletic department staff toward desired objectives. Departments that see themselves as winners utilize more thorough and formal channels of planning in preparing for competition. Start the planning process by defining the purpose or mission of your department as it relates to the institution. Eighty percent of the institutions that had results that were classified as good or excellent had a formal written statement of purpose.

Next, conduct a competitive analysis of any sports on an annual basis. Two-thirds of the high achievers conducted both internal assessments of strengths and weaknesses as well as an assessment of the competitive environment and their rivals.

Include the staff in the development of realistic goals and the subsequent strategies utilized to achieve them. Goals are more readily accomplished when they are internalized and personal. Keep an open mind in this phase. Almost twice as many high achievers reviewed a complete list of alternative strategies as did the average department.

Tie the performance appraisal and compensation of the coaching staff to their performance on the desired objectives. The group that accomplished the highest results stated that their performance appraisal was tied to the negotiated objectives at a rate that was 63 percent higher than the general respondent.

	ALL	RESULTS 4 & 5	RESULTS 5
Number in Sample	138	109	14
Budget under 1 MM	78%	76%	71
Purpose Written	72.5	80	93
EA Year	52	52	67
EA Scope (Conference)	30.7	34	55
EA Depth (All)	64	70	83
SW (Year)	67	67	71
SW (All sports)	83	88	100
Assume (All)	49	52	62
Strategy Analysis of Alternatives	34	40	57
Objectives Negotiated	80	85	79
Coach Performance Appraisal (Considerable)	36	38.5	57

X MEAN	ALL	RESULTS 4 & 5	RESULTS 5
Number	138	109	14
Purpose	3.51	3.66	3.93
EA Time	2.26	2.31	2.42
Scope	3.07	3.20	3.36
Depth	3.22	3.38	3.67
SW Time	2.34	2.42	2.43
Depth	3.61	3.73	4.00
Assume	2.67	2.76	2.92
Strategy	3.69	3.85	4.21
Objectives	2.75	2.79	2.79
Appraise	2.57	2.70	2.85
Coach Performance Appraisal	3.03	3.19	3.43
Result	3.83	4.13	5.00

APPENDIX B

SAMPLE PURPOSE STATEMENTS AND EXAMPLES OF ENVIRONMENTAL FACTORS, OBJECTIVES, AND STRATEGIES

SAMPLE PURPOSE STATEMENTS

OSU POSSE CLUB MISSION STATEMENT:

The OSU Posse is the athletic fund-raising organization for Oklahoma State University. It provides a tangible method for Cowboy fans to express their loyalty and commitment to the student athletes and their respective programs.

Membership is automatically granted to all donors who annually give \$50 or more to any athletic program or fund. Today nearly 5,000 individuals and business organizations are active members of the OSU Posse.

While there are many benefits to being a Posse member, the primary goals all members share are that OSU student athletes receive a quality education, and Oklahoma State's athletic teams continue to excel.

THE UNIVERSITY OF TULSA ACADEMIC SUPPORT PROGRAM FOR STUDENT ATHLETES MISSION STATEMENT:

The primary purpose of the program is to increase the graduation rate of student athletes within the tenure of their athletic eligibility. This purpose is accomplished by improving the overall ability and increasing the desire of student athletes to excel in the academic environment of TU. The program builds self-esteem and increases self-definition, self-responsibility, and self-motivation. It requires nothing less than full and active participation on the part of student athletes, which invariably increases their level of academic and social maturity, thus having a positive effect on the rate of graduation.

THE UNIVERSITY OF OKLAHOMA ATHLETIC DEVELOPMENT AREA MISSION/PURPOSE STATEMENT:

- (1) To provide monies and resources for the overall Athletic Department plan.
- (2) To serve as one of the Public Relations arms of the Athletic Department.
- (3) To create a positive environment for our customers.

Help provide money, resources, and enthusiasm for O.U. athletics. Cover gaps between ticket sales and needs. To support overall athletic department plan. To keep existing customers and create new ones. Create an environment where athletic development is efficient and fun. To interact with various segments of the athletic department and their constituency.

EXAMPLES

ENVIRONMENTAL FACTORS

1. According to the NCAA study (6) recently released:
 - a. Fifty-seven percent of all athletes who enrolled in 1987-88 graduated, compared with 56 percent of the student body.
 - b. Holy Cross and Georgetown had a graduation rate of 95 percent.
 - c. Others include Arkansas, 44%; Oklahoma, 53%; Tulsa, 8%; and Oklahoma State, 48%. In each case, these rates were higher than the general student body.
2. Football bowl television ratings are down.
3. NCAA basketball TV rating, 21.6; Orange Bowl, 17.8.
4. Gross receipts from 18 bowl games increased on average 33% over last six years to \$88.4 million.
5. Gross receipts for the basketball tournaments increased 120% to \$153 million.

OBJECTIVES

Here are additional University of Maryland objectives for 1997-98:

1. Fiscal Integrity
 - a. Balance the \$27,000,000 budget.
 - b. Make the final \$500,000 payment on the accrued operating debt accumulated from 1984-1994.
 - c. Pay down another \$2.2 million on original 1994, \$41 million facilities debt which is now \$34 million.
2. Academic Integrity
 - a. Continue to graduate student athletes at a rate above that of general student body using NCAA graduation rate formula.
 - b. Elevate the current graduate ratio of student athletes of 65%-70% to range of 75%-80%.
 - c. Academics dismissal ratio for 1997-98 will be no higher than 5% for our team.

STRATEGY TO MEET OBJECTIVES

1. University of Oklahoma and many other schools are going to regular grass.
2. Arkansas recently moved to the Southeast Conference.
3. Conferences have just completed realignment.
4. Northeastern State University left NAIA for NCAA Division II.
5. University of Georgia signed a \$800,000 contract with NIKE. University of Texas signed with Reebok.
6. The University of Oklahoma offers a new family plan in its football ticket package for the first time.

OBJECTIVES***OBJECTIVES
FOR THE NEXT 3 YEARS****2005/06 2006/07 2007/08****ACADEMIC:**

GPA
 Percentage of players graduating after 4-year eligibility is used

2.2 2.2 2.3
 50% 50% 60%

ATTENDANCE:

Football Season Tickets
 Basketball Season Ticket Sales/percent increase
 Baseball Season Ticket Sales

21,600 25,000 30,000
 4,400 4,840 5,320
 200 250 300

VICTORY TITLES:

Percent/number of teams to Regionals
 Minimum winning for all teams

25%/3* 25%/3* 40%/5*
 60% 60% 65%

PRESS:

Obtaining national media spots

2 4 6

SCHEDULING:

Have games, meets, and/or tournaments
 with nationally known teams in that sport

2 2 2

PLAN****OBJECTIVES:**

- % Academic: 2.1 GPA to 2.5 GPA by 2006/07.
- % 50% graduation rate of those who have completed their 4 years of eligibility (70% by 2006/07).

STRATEGIES:

- % Study Hall
- % Testing (Reading and Writing Clinic)
- % Comparison study by teams (Intra) academics
- % Determine major area
- % Recognition of teams for academics
- % Monitor and evaluate the athletes' progress toward graduation.

ACTION	PERSON RESPONSIBLE	STATUS	DATE COMPLETED
Study hall—3/week	Coach	Semester	Semester basis
Pretest before semester	Academic Counselor, Ed. Dept.		Before semester
Semester	Academic Counselor		
Each recruit is given one hour learning test	Coach		
<ul style="list-style-type: none"> • Study hall is mandatory for all freshmen, transfers, and those who have a GPA below 2.25. • Each coach turns into the A.D. and Academic Advisor his team's GPA goal. 			

* Taken from an actual plan with numbers and percentages changed for the sake of confidentiality.

** From actual plan, with some changes to protect confidentiality.

APPENDIX C
ATHLETIC MARKETING

ATHLETIC MARKETING

PLANNING AND STRATEGIES

Marketing planning and strategy all too often are haphazard and not coordinated. It has been a day-to-day, season-to-season, "Wonder what we can do next?" approach. A better strategy is to identify your target market and niche in the marketplace. Develop a general promotion strategy or message for your total potential market. For example, the University of Tulsa's athletic marketing plan emphasized "Get Wacky" in their first year in the Western Athletic Conference. There is a general marketing plan for the total customer base that includes all aspects of the plan. For a university, decisions on pricing, parking, food, event time, and special promotions must be made. The total potential market is then broken into segments. For example, see Figure 1.

FOOTBALL MARKET SEGMENTS:

- A— Students on campus
- B— Alumni within a two-hour drive of campus
- C— Alumni relations long distance
- D— Corporate
- E— Special groups; churches, etc.
- F— Local people with no direct tie to the university

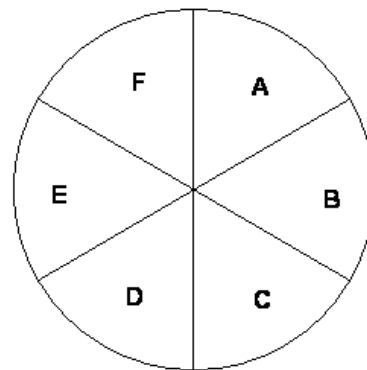


Figure I

These are examples. There are more segments.

The next step is to decide the priority and profit potential of each market segment. The highest priority segments receive the most attention. Then a marketing plan is developed for each market segment. The key word is identifying the CUSTOMER in each segment. My experience is that almost all business athletic executives assume they know the customer and what the customer wants. We can tell you this is a BIG MISTAKE!

Marketing research should be done with each segment. Some combination of focus groups, phone surveys, and mail questionnaires should be used. Here is a recent example of why marketing research is important. During a Sunday morning's work session with a major NCAA Division I university, we were working on a marketing plan in a corner of a hotel restaurant. A man and his wife sat near where we were having breakfast. As Migliore got up to go to the breakfast bar for a refill, he passed their table and remarked, "Were you all here for the game yesterday?" They said yes. "Well we are here working on a marketing plan for athletics. What do you think?" They were eager to tell of their displeasure about the changes to all night games in 1997. The member of the athletic department explained that the newly installed lights were intended for the occasional, but financially rewarding, evening TV games; not for all games. The couple, who were part of a group of faithful fans who had driven 600 miles to games for over 20 years, was relieved to have a clear understanding of what was planned for the lights. Their assumption was incorrect. The point of this scenario is, you do not know what your customer is thinking unless you ask. The next promotional message to season ticket holders must address the purpose of the new lights and how it affects the games schedule.

Objectives, strategy, and action must be determined for each market segment. Each market segment plan can be volunteer-driven. The team is made up of mostly volunteers. One member of the University's Athletic Department should be on each market segment action team. For example, university students would be on the team looking into how to increase student attendance. Within each market segment there are other natural divisions. Examples are men, women, children, families with infants, etc. Attend any major sporting event and notice the long lines at women's restrooms. Anyone that is not up to speed on the growing dominance of women in the marketplace is asleep at the wheel. This is a promotional dream.

Who will be first in athletics to clean up, revamp, and expand women's restrooms? Afterwards, every marketing promotional message should make sure this is in the message.

According to a study of NCAA schools by Dr. R. E. Stevens, a professor at Northeast Louisiana University (3), only 42 percent of Division I athletic departments have marketing plans in writing. My opinion is, if it is not in writing, it is not a plan. It is flying by the seat of your pants on a hit-or-miss basis. Oklahoma State University, for example, has a fully developed marketing plan in writing. Furthermore, everyone associated with athletics should cover the stadium/gym/field, interacting with their customers.

After 40 years of attending athletic contests, we remain amazed at the inefficiency of ticket sales and Will-Call Window transactions at many athletic events. Do you think the late Sam Walton, of Wal-Mart, would have customers standing in line in the cold for hours buying basketball tickets? I recall one big football game that took the full first quarter for the tickets to be dispersed out of the Will-Call Window. At another local university last year it took 25 minutes for me to get tickets at 9:30 a.m. for a game that night. The person at the ticket window was new and had trouble with the computerized ticket system. We attended a basketball game there last week. I watched the line of people waiting to buy tickets. It never moved.

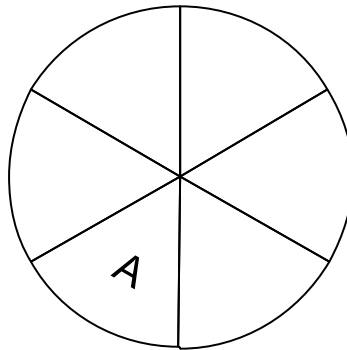
One university basketball package for donors included free preferential parking in their season package. Parking was not included for the exhibition games. Many of these fans were upset.

The recently reported seating incident at the OU/OSU football game in Stillwater is a good example of seating/ticketing confusion. It was reported that scores of students were in reserved seats and refused to move when paying fans showed up with tickets for the same seats. The students were not made to move. Why? Anyone may want to speculate what Southwest Airlines would do with unauthorized customers.

Credit is due to the Tulsa Drillers Baseball Club. At every game Drillers management are all over the stadium and grounds. They are "in tune" with their fans.

The last point to remember is this: sports to the average consumer is entertainment. Everyone in your total possible target market has a number of choices available at any given point in time. Every fall football Saturday offers other alternatives like golf, tennis, fishing, or mowing the yard. Children's sports activities are a priority for parents and grandparents. During the winter months indoor activities take over, such as Sinfonia, Philharmonic, movies, and ice hockey. All compete for the entertainment dollar. The Sports Marketing executive must create a positive cost/benefit/entertainment package.

MARKET SHARE



**A—YOUR MARKET SHARE OF
ENTERTAINMENT MARKET**

Figure 2

The logical conclusion to all of this is that slowly but surely the "industry" has evolved from being football driven to entertainment. It took the railroads almost 50 years to determine they were in the business of service and transportation. In the early days they were railroads. The railroads opened the West and, consequently, were "the only game in town." If you moved something, it was by rail. It was only after railroads redefined their business that they began to prosper.

Every industry has a shakeout period. The PennCentral merger did not work well at the time; it was the largest bankruptcy in U.S. history. College football is an industry segment going through a shakeout period. Yes, you can remain in the "football business" but only under the right set of conditions. Examples: Nebraska football, a steady winner, the only major football program in the state. Texas had its fourth largest crowd ever with 82,312 fans at the Texas A&M game, with its intense longtime traditions and rivalry. If the right set of conditions is not present, you are not in the "railroad" or "football" business, but in the entertainment business.

The November 5, 1996, attendance around the nation illustrates the point. Colorado, ranked number 6, had 45,059 with stadium capacity of 51,748. Colorado at that time was still a winner with tradition and had 6,689 empty seats. Oklahoma had 54,462 for its game in Norman against Missouri that same day. An interesting twist is that Gibbs "outsold" McCartney by 9,303 tickets. No offense intended, but it does not take a genius to sell a Nebraska football ticket or a ticket to the Texas/Texas A&M game. It does take a genius to develop a marketing plan that is part of a coordinated overall comprehensive plan that will fill a football stadium on a Saturday afternoon. In 90 percent of the cases, football is a form of entertainment. Entertainment in Oklahoma creates choices. I have a loyalty to the area "Big 4." Every fall, we balance fishing, golf, and football every Saturday. There is a cost/benefit ratio that balances the decision. There is only one opening day of pheasant season and deer season. A marketing plan needs to identify all the market niches and a strategy to sell that niche.

November 12, 1996, attendance for the Big Four followed the predictable pattern. Oklahoma State had a near sellout for its home game against OU with 50,116 (capacity 51,000). The

University of Tulsa and Arkansas played Division IAA Southwest Missouri State and Northern Illinois. Their respective attendance: 17,349 (capacity 42,000) and 37,568 (capacity 50,019).

Weather was not a factor in these three games. On the same day, note attendance:

Nebraska at Iowa State	45,186	Texas A&M at Louisville	36,112
Colorado at Kansas	35,000	Houston at Texas	54,654
SW Louisiana at Texas Tech	27,636	Kansas State at Missouri	35,361
TCU at SMU	20,463		

Some ironies this same Saturday: Colorado State ranked number 12 at home with 23,741; Oregon State ranked number 24, drew 26,438 at home.

Big winners in attendance derby were:

Auburn/Georgia	89,214	Penn State/Illinois	72,364
Florida State/Notre Dame	72,868	Michigan/Minnesota	105,624
Florida/South Carolina	85,028	Wisconsin/Cincinnati	77,745
Tennessee/Memphis	94,690		

One could conclude that a nation ranking (Colorado State 23,741, Oregon State 26,438), Oregon State 26,438), large metro area (TCU/SMU 20,463) does not fill stadiums.

One could conclude also that a winning season does not guarantee attendance revival. In 1997, despite its best record in nine seasons (83), Oklahoma State saw its home attendance go relatively unchanged. The Cowboys averaged 39,517 fans, a slight increase from the 1996 attendance of 39,244.

What we are looking for is illustrated by the formula:

$$x = f(A, B, C, D \text{ ____?})$$

The dependent variable is football attendance, represented by x.

The independent variables could be weather, opponent homecoming, etc. What combination of independent variables will have an effect on home game attendance?

If there are enough customers like me, in a market segment, consider these do's and don'ts.

DO	DON'T
1. Give me one Thursday night game. That gives me a weekend for the other entertainment alternatives.	1. Schedule a Saturday game the opening day of deer season.
2. Provide food, entertainment, and parking that gets me there early.	2. Schedule a well-advertised open house at my college for homecoming with <u>no faculty or staff in attendance</u> .
3. Have local police at intersection to move traffic after the game.	3. Have a congested, <u>inefficient, disorganized, will-call window</u> .

APPENDIX D
SURVEYS AND WORKSHEETS

RECRUITING SURVEY

Check what is applicable for you:

Male _____	Female _____	Married? Yes ____ No ____
Basketball _____	Volleyball _____	Religion: Methodist _____
Baseball _____	Track _____	Baptist _____
Tennis _____	Fencing _____	Catholic _____
Golf _____		Pentecostal _____
		Other _____

Please rate the following factors as to their importance to you in making your decision as to where to attend school and participate in athletics. Circle these factors on a scale of 1 to 5, with 1 being least important and 5 being most important.

	Least Important	→	Most Important		
1. Scholarship Offer.....	1	2	3	4	5
2. Record Last Year	1	2	3	4	5
3. Record in Recent years	1	2	3	4	5
4. Coaching Staff.....	1	2	3	4	5
5. Tradition of School	1	2	3	4	5
6. National Exposure (Press, TV Time)	1	2	3	4	5
7. Location.....	1	2	3	4	5
8. Major School vs. Minor School	1	2	3	4	5
9. Personal Goals (Academic Preparation, Professional Player).....	1	2	3	4	5
10. Friends Attend	1	2	3	4	5
11. Teammates Attend	1	2	3	4	5
12. Family Insistence or Preference	1	2	3	4	5
13. Spiritual Leading.....	1	2	3	4	5
14. Coaching Reputation.....	1	2	3	4	5
15. Beauty of Overall Campus.....	1	2	3	4	5
16. Quality of Dorm, Living Conditions	1	2	3	4	5
17. Quality of Athletic Facilities (Other than Athletic Dorm)	1	2	3	4	5
18. Weather.....	1	2	3	4	5
19. Opportunity for Post-Season Tournament.....	1	2	3	4	5
20. Quality of Academic Programs	1	2	3	4	5
21. Travel Opportunities by the Athletic Team.....	1	2	3	4	5
22. Availability of Academic Assistance (Such as Tutoring)	1	2	3	4	5
23. Emphasis on Graduating with Degree	1	2	3	4	5
24. High School Coach's Recommendation	1	2	3	4	5
25. Schedule of Opponents	1	2	3	4	5
26. Alumni Contact	1	2	3	4	5
27. Quality of Recruiting Effort.....	1	2	3	4	5
28. Family Economic Situation	1	2	3	4	5
29. Impression of Present Players.....	1	2	3	4	5
30. Parents' Wishes	1	2	3	4	5
31. Personality Profile	1	2	3	4	5
32. Impression at Campus Visit.....	1	2	3	4	5
33. Visit to Campus Well Coordinated	1	2	3	4	5
34. Lifestyle	1	2	3	4	5

Other reason for coming to this school: _____

OKLAHOMA UNIVERSITY BASKETBALL SURVEY

Hello, my name is _____. I'm a student doing a class project. We want to know how you feel about OU basketball. May we ask you a few questions?

How many OU games have you attended this year, including this one? _____

Where are you from? _____
City State

What suggestions do you have to make the game day experience even more enjoyable?

On a scale of 1-10 (10 = high), how much have you enjoyed the games you have attended?

(Circle choice) 1 2 3 4 5 6 7 8 9 10

What do you do before the game?

- ☐ arrive just in time for the game
- ☐ lunch/dinner
- ☐ visit friends
- ☐ tailgate

What do you do after the game?

- ☐ lunch/dinner
- ☐ visit friends
- ☐ tailgate
- ☐ go straight home

How much money will you spend today in Norman? _____

When you attend a game, do you stay for the day only or overnight? _____

If overnight, how many nights do you stay? _____

When you stay overnight, where do you stay? Please check all that apply.

- | | | |
|--|--|---------------------------------------|
| <input type="checkbox"/> Motel/Hotel | <input type="checkbox"/> Campground | <input type="checkbox"/> With Friends |
| <input type="checkbox"/> RV/Motor Home | <input type="checkbox"/> Other (specify) _____ | |

Are you a graduate or have you attended OU as a student?

- ☐ Yes ☐ No

STUDENT USE ONLY

STUDENTS: Please note (don't ask) and record your observations about age and gender.

GENDER: Male _____ Female _____ AGE _____

ARKANSAS FOOTBALL SURVEY

Hello, my name is _____. I'm a student doing a class project. We want to know how you feel about Arkansas football. May we ask you a few questions?

How many Arkansas games have you attended this year, including this one? _____

Where are you from? _____
City State

What suggestions do you have to make the game day experience even more enjoyable?

On a scale of 1-10 (10 = high), how much have you enjoyed the games you have attended?

(Circle choice) 1 2 3 4 5 6 7 8 9 10

What do you do before the game?

- ☐ arrive just in time for the game
- ☐ lunch/dinner
- ☐ visit friends
- ☐ tailgate

What do you do after the game?

- ☐ lunch/dinner
- ☐ visit friends
- ☐ tailgate
- ☐ go straight home

How much money will you spend today in Fayetteville? _____

When you attend a game, do you stay for the day only or overnight? _____

If overnight, how many nights do you stay? _____

When you stay overnight, where do you stay? Please check all that apply.

- | | | |
|--|--|---------------------------------------|
| <input type="checkbox"/> Motel/Hotel | <input type="checkbox"/> Campground | <input type="checkbox"/> With Friends |
| <input type="checkbox"/> RV/Motor Home | <input type="checkbox"/> Other (specify) _____ | |

Are you a graduate or have you attended Arkansas as a student?

- ☐ Yes ☐ No

STUDENT USE ONLY

STUDENTS: Please note (don't ask) and record your observations about age and gender.

GENDER: Male _____ Female _____ AGE _____

ORU BASKETBALL

Strategic Marketing Plan Worksheets



R. HENRY MIGLIORE, PH.D.
Professor Emeritus
Northeastern State University
President, Managing for Success
Jenks, Oklahoma

ORU BASKETBALL STRATEGIC MARKETING AND DEVELOPMENT TO SUPPORT THE ORU ATHLETIC PLAN

R. Henry Migliore

Marketing Plan

Purpose of Marketing Function:

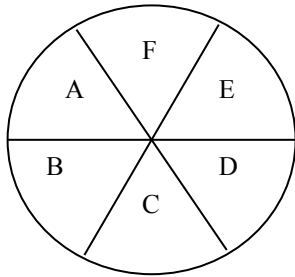
- Differentiate ORU basketball from the competition
- Keep existing customers
- Meet and exceed customer expectations
- Create new customers
- Make ORU Athletics the kind of place that people want to do business with
- Operate in an ethical manner
- Monitor the pulse of the marketplace
- Serve and contribute as a member of the organizational team
- Maintain a positive image of the organization with all advertisements

Environmental Factors Specific to Marketing:
Market Analysis

1. Customer Analysis—How do people in attendance feel about the game experience?
2. Competitive Analysis/Benchmarking—What are other schools doing?
3. Market Research—How do people attending the game feel about the total experience: parking, ticket office, season ticket purchase, game itself, advertising promotion?

GENERAL MARKETING STRATEGY

Identify Key Market Segments.



A	_____
B	_____
C	_____
D	_____
E	_____
F	_____

Develop a Marketing Strategy for each market segment. Market research and focus groups should be considered to get specific attitudes and information about each individual group.

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

What ORU advertising/promotions do you expect to be best opportunity in year 2005?

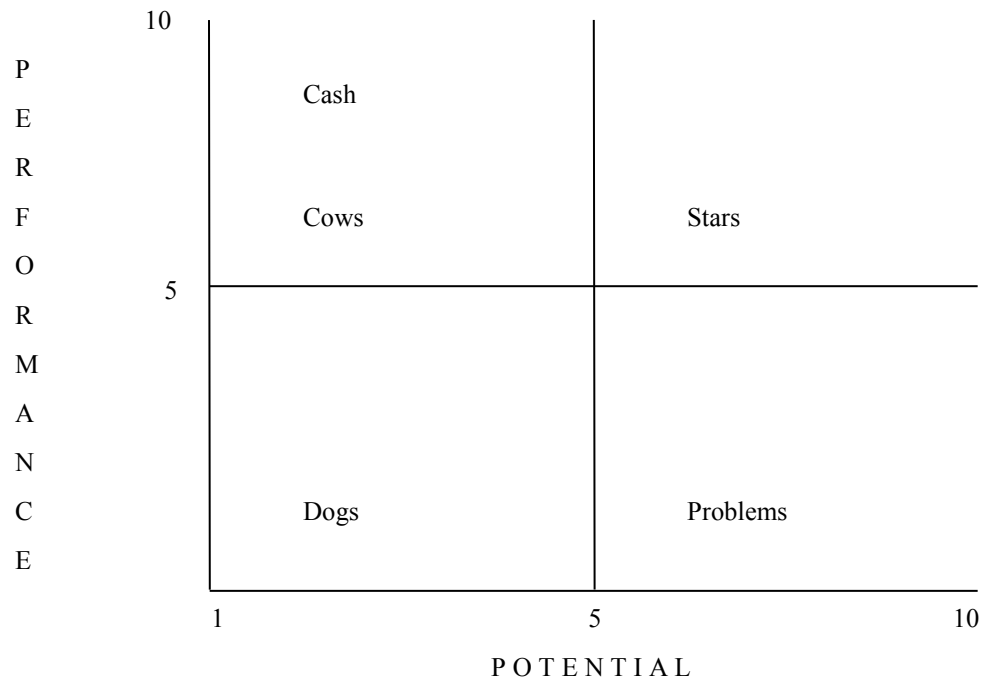
- 1.
- 2.
- 3.
- 4.
- 5.

Which promotion/advertising and other marketing strategies will decline and/or present a problem to remain in competition in five years (2009)?

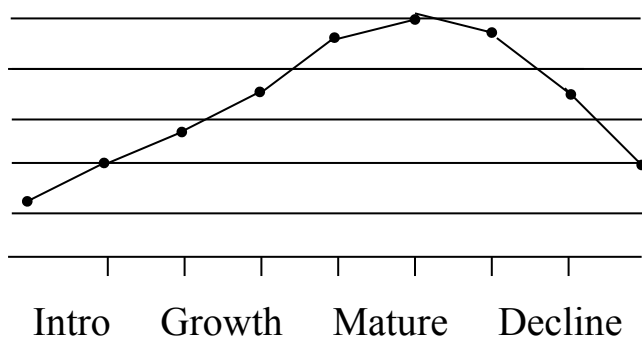
Put yourself in your customers' shoes. Why are they coming to ORU games?

What is your competition doing that could be a threat?

HOW DO PRODUCTS/SERVICES/PROGRAMS FIT PERFORMANCE/POTENTIAL MATRIX?



Where do all (or most) of marketing efforts fit product life cycle?



List Products/Services

A.

B.

C.

D.

E.

F.

G.

Marketing Strengths and Weaknesses

Strengths:

Weaknesses

Marketing Assumptions

1.

2.

3.

OBJECTIVES

	Last Year Actual	Next Year	5 Years
A. Total Attendance			
B. Students			
C. Faculty Staff			
D. Season Tickets			
E. Same-Day Sales			

MARKETING STRATEGY

WHAT PRODUCTS/SERVICES/PROGRAMS SHOULD BE ADDED TO PRESENT PRODUCT MIX?

WHAT PRODUCTS/SERVICES/PROGRAMS SHOULD BE DROPPED FROM PRESENT PRODUCT MIX?

HOW DO YOU REACT TO A RAPIDLY CHANGING MARKET PLACE?

WHAT OPPORTUNITIES ARE AVAILABLE DUE TO CHANGES?

WHAT ARE KEY MARKETING STRATEGIES?

MONITORING AND CONTROL

1. PERFORMANCE ANALYSIS
2. CUSTOMER DATA FEEDBACK

MARKETING ACTION PLAN

Objectives_____

Overall Responsibility: _____

Strategies_____

Start Date	Action Steps	Due Date	Responsibility	Status

Objectives_____

Overall Responsibility: _____

Strategies_____

Start Date	Action Steps	Due Date	Responsibility	Status

SET UP A WAY TO MONITOR HOW YOU ARE DOING AND A WAY TO CREATE ACTION

An action plan for each objective area should be developed. It helps goals come to life with appropriate action.

ACTION PLAN

OBJECTIVE:

STRATEGIES:

A.

B.

C.

D.

E.

Action Plan	Person Responsible	Start Date	Date Completed

SALES MANAGEMENT PLAN

Now that the marketing plan is developed, it is time to develop a sales management plan. Ideally, managers and salesmen have been in on developing the marketing plan. It is important that those who execute the plan are in on the plan. The task is to develop a sales management plan, which in effect executes the marketing plan.

Sales Management Plan

Organize sales force

Select sales force

Train sales people

Motivate

Set quotas, goals, objectives for total sales effort down to individual salesperson.

Compensation plan that encourages performance

Evaluate progress

OKLAHOMA STATE UNIVERSITY FOOTBALL

Strategic Marketing Plan Worksheets

R. HENRY MIGLIORE, PH.D.

Professor Emeritus

Northeastern State University

President, Managing for Success

Jenks, Oklahoma

OSU FOOTBALL STRATEGIC MARKETING AND DEVELOPMENT TO SUPPORT THE OSU ATHLETIC PLAN

R. Henry Migliore

Marketing Plan

Purpose of Marketing Function:

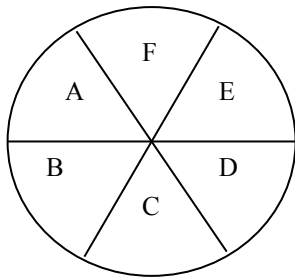
- Differentiate OSU football from the competition
- Keep existing customers
- Meet and exceed customer expectations
- Create new customers
- Make OSU Athletics the kind of place that people want to do business with
- Operate in an ethical manner
- Monitor the pulse of the marketplace
- Serve and contribute as a member of the organizational team
- Maintain a positive image of the organization with all advertisements

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A	_____
B	_____
C	_____
D	_____
E	_____
F	_____

Develop a Marketing Strategy for each market segment. Market research and focus groups should be considered to get specific attitudes and information about each individual group.

1.

2.

3.

4.

5.

6.

What OSU advertising/promotions do you expect to be best opportunity in year 2007?

1.

2.

3.

4.

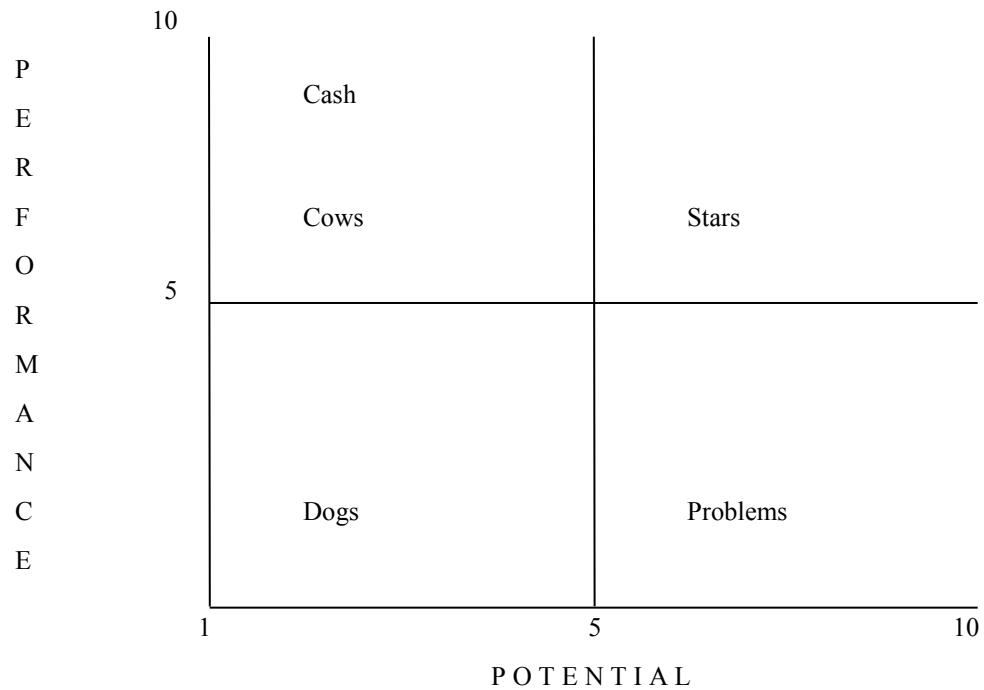
5.

Which promotion/advertising and other marketing strategies will decline and/or present a problem to remain in competition in five years (2009)?

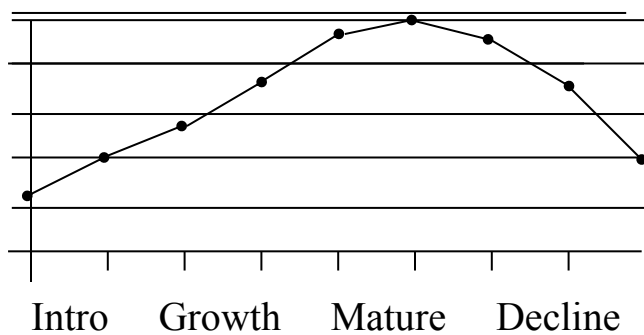
Put yourself in your customers' shoes. Why are they coming to OSU games?

What is your competition doing that could be a threat?

HOW DO PRODUCTS/SERVICES/PROGRAMS FIT PERFORMANCE/POTENTIAL MATRIX?



Where do all (or most) of marketing efforts fit product life cycle?



List Products/Services

A.

B.

C.

D.

E.

F.

G.

Marketing Strengths and Weaknesses

Strengths:

Weaknesses

Marketing Assumptions

1.

2.

3.

OBJECTIVES

	Last Year Actual	Next Year	5 Years
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D. Season Tickets			
E. Same-Day Sales			

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2. CUSTOMER DATA FEEDBACK

MARKETING ACTION PLAN

Objectives_____

Overall Responsibility: _____

Strategies_____

Start Date	Action Steps	Due Date	Responsibility	Status

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OBJECTIVE:

STRATEGIES:

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B.

C.

D.

E.

Action Plan	Person Responsible	Start Date	Date Completed

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Set quotas, goals, objectives for total sales effort down to individual salesperson.

Compensation plan that encourages performance

Evaluate progress

APPENDIX E

REFERENCES

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R. HENRY MIGLIORE

Dr. Migliore is President of Managing for Success, an international consulting company. He was Professor of Strategic Planning and Management at Northeastern State University/Oklahoma State University—Tulsa from 1987-2002; Dr. Migliore teaches at the graduate and undergraduate levels. He was formerly Professor of Management and former Dean of the ORU School of Business from 1975 until 1987. He was a visiting professor at the University of Calgary; ITESM Campus Guadalajara, Guadalajara, Jalisco, Mexico; Singapore; and WuYi University in China.

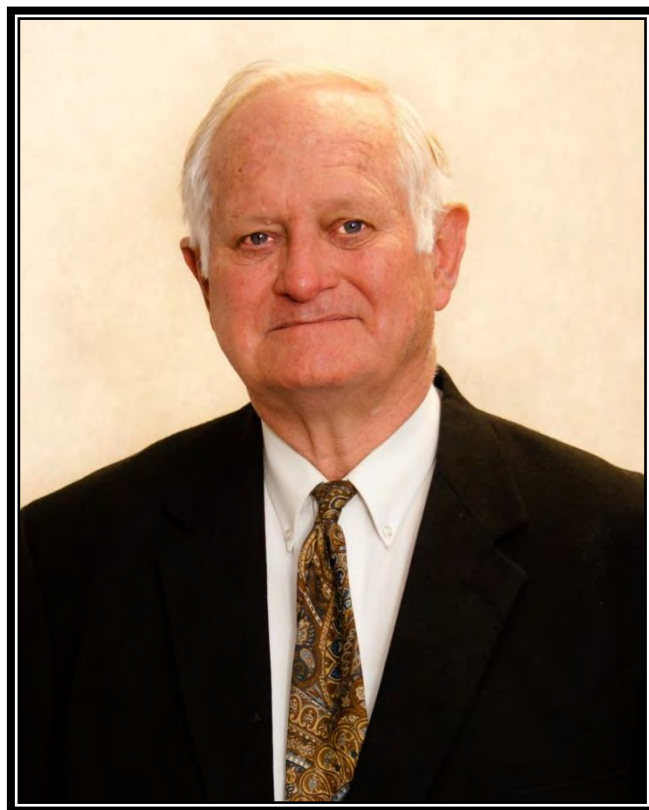
He is former manager of the press manufacturing operations of Continental Can Company's Stockyard Plant. Prior to that, he was responsible for the industrial engineering function at Continental's Indiana plant. In this capacity, Dr. Migliore was responsible for coordinating the long-range planning process. In addition, he has had various consulting experiences with Fred Rudge & Associates in New York and has served large and small businesses, associations, and nonprofit organizations in various capacities. He has made presentations to a wide variety of clubs, groups, and professional associations. Dr. Migliore has been selected to be on the faculty for the International Conferences on Management by Objectives and the Strategic Planning Institute Seminar Series. He is also a frequent contributor to the Academy of Management, including a paper at the 50th anniversary national conference. He served for 12 years on the Board of Directors of T. D. Williamson, Inc., and was previously on the Boards of the International MBO Institute, Brush Creek Ranch, and the American Red Cross/Tulsa Chapter, and is chairman of a scholarship fund for Eastern State College. In 1984 he was elected into the Eastern State College Athletic Hall of Fame. Dr. Migliore has been a guest lecturer on a number of college campuses. He has lectured for the Texas A & M, Pepperdine, ITESM—Guadalajara, Harvard and the University of Calgary Executive Development Programs. He serves on Chamber and/or Civic Committees, and he served on the Administrative Board at The First United Methodist Church, Tulsa, Oklahoma. He was selected Who's Who on a list of 31 top echelon writers and consultants in America.

To date, previous articles on management and business subjects have appeared in *AIIE Journal*, *Construction News*, *Management World*, *Management of Personnel Quarterly*, *Journal of Long-Range Planning*, *Dental Economics*, *Health Care Management Review*, *MBO Journal*, *Business and Society Review*, *Parks and Recreation Journal*, *The Journal of Business Strategy*, *Daily Blessing*, *Ozark Mountaineer*, *On Line*, *Real Estate Today*, *Communication Briefings*, *Journal of Sports Management*, *Alberta Business Review*, *The Planning Review*, *Hospital Topics*, *Journal of East-West Business*, *Journal of Ministry Management*, *IIE Solutions*, *Industrial Safety and Hygiene*, *Debt-Free Living*, *Supply Chain Management*, and two Mexican journals. His books include *MBO: Blue Collar to Top Executive*, *An MBO Approach to Long-Range Planning*, *A Strategic Plan for Your Life*, *Strategic Long-Range Planning*, *Strategic Planning for Church and Ministry Growth*, *Common Sense Management: A Biblical Perspective*, *Personal Action Planning: How to Know What You Want and Get It*, and *Tales of Uncle Henry*. They describe personal theories and experiences. He contributed to the books, *Readings in Interpersonal and Organizational Communication* and *International Handbook on MBO*. The book *The Management of Production: A Productivity Approach* is coauthored. Other books include *Strategic Planning and Management*, *Strategic Life Planning*, and *Common Sense Management*. The manuscript *People, Productivity, and Profits* has been completed. He is coauthoring a series of books with Haworth Press. Released so far are *Church and Ministry Growth* (1995), *Planning for Nonprofit Management* (1995), *Strategic Planning and Health Care* (1996), *Strategic Planning for Private Universities* (1997), and *Strategy Planning for Collegiate Athletics* (spring 2000). *Strategic Long-Range Planning for the New Millennium* was updated and published in January 2012. His books have been translated into Russian, Chinese, Korean, Spanish, German, and Japanese. A Spanish version of *Strategic Planning* was updated Spring 2013. He has also produced "Personal Financial Success," a video training kit offered on nationwide television, and video/audio tapes to go with his books. Dr. Migliore has developed three complete videotaped and computer Internet web-based correspondence courses. January 2013—A new course has been developed and instituted in 2013.

In November 1985 the daily "Managing for Success" cable television program was inaugurated and was on the air until March 1986. It was on Tulsa Cable. The series began again on Tulsa Cable in September 1986. He writes occasional columns for the *Tulsa World*, *Tahlequah Pictorial Press*, *Collinsville News*, *Jenks Journal*, and *Muskogee County Times*. A complete video series with four summary units and thirty-six support units covering planning, management, and common sense management supports other material.

In November 1998 Dr. Migliore was inducted into the Eastern Oklahoma State Hall of Fame. This followed his induction in 1988 into the Eastern Athletic Hall of Fame.

Dr. Migliore has been a small business consultant for the Oklahoma Small Business Development Center for 13 years. Dr. Migliore holds degrees from Eastern Oklahoma State, Oklahoma State University, St. Louis University, and completed his doctorate at the University of Arkansas. He belongs to the Academy of Management and the Planning Executives Institute and is a senior member of the American Institute of Industrial Engineers.



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