

Marketing Specialist Knowledge and Its Influence: a Practice Approach

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Abstract

Calls to further understand the marketing department's role and influence (e.g., Dibb, Simões, & Wensley, 2014; Homburg, Vomberg, Enke, & Grimm, 2014; Marketing Science Institute, 2018), prompted this research to examine marketing specialist knowledge and its influence using a Practice Theory approach. Its objectives include classifying the marketing specialists' knowledge domains and identifying their practices and praxes as they planned, developed, implemented, and appraised a recent marketing project. To further distinguish marketing specialist knowledge and influence, their use of practices were identified at three levels, namely among other marketing specialists, their firm, and their market. The constitution of each of their knowledge domain practices was sought as well as their thinking and decision-making practices. The goal was to understand how and why the marketing specialists' knowledge was influential during their project work.

This topic is interesting as marketing academics have been calling for further studies on the roles and activities of marketing practitioners. For example, Jaworski (2011, p. 212) points out that we have only a "superficial, outdated knowledge of marketing roles and positions within firms". Also, Skålén and Hackley (2011) raised concerns over "the relative lack of 'bottom-up' empirical research into how marketing is actually done in organizations" (p. 189). Further, Dibb et al., (2014) indicated that a lack of inductive research is a concern for those who would like concrete descriptions of what marketers do (Skålén & Hackley, 2011; Svensson, 2007; Webster, 2002). Although research shows marketing *departments* add value to firms, scholars claim that we are still bereft of intelligence relating to the everyday work and social interaction of marketing *practitioners* (Dibb et al., 2014; Jaworski, 2011). Additionally, reports on the marketing department's declining influence in firms also provided impetus toward this research (cf. Homburg et al., 2014).

Data from board members, senior management, marketing specialists, personnel, shareholders, and stakeholders of four New Zealand firms that carried out a marketing project were collected and analysed. Sources of data were semi-structured one-on-one interviews and focus groups and their transcriptions; marketing specialists' reflective journals, and marketing project artefacts were also collected.

The conceptual model summarising this research provides some interesting insights into the knowledge and influence of marketing specialists. First, the findings suggest that marketing specialists are distinguished by five knowledge domains, namely: marketing expertise, organisation familiarity, market intelligence, leadership, and life experiences. The findings identify and discuss twelve practices within these knowledge domains and discuss the resulting praxes of marketing specialists at either the marketing specialist, firm, or market levels. Further, a description of how each of the practices is constituted by their procedures, understandings,

and engagements is given, providing an in-depth, practice-based account of marketing specialist knowledge. Next, the marketing specialists' consulting, thinking, and judgement-making processes are analysed and discussed, including the phenomenon described in this research as revelatory influences or ideas. Following on, the practices are discussed in terms of their subsequent praxes, or the activities that the marketing specialists carried out, which links to their influence at each level. In doing so, the findings fill gaps in our knowledge regarding what marketing specialists do, how they think, how market orientation is performed, and how marketing projects are carried out. Hence, this research has answered calls to eschew simple categorisations and produce a nuanced account of marketing work, evidencing pluralistic ways in which marketing activities were constituted and practised (Ardley & Quinn, 2014; Skálén & Hackley, 2011; Svensson, 2007). The study also affirms how indispensable and complementary marketing specialists are regarding their firm's project-related performance and their firm's market orientation.

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Attestation of authorship

I hereby declare that this submission is my own work. To the best of my knowledge and belief, it contains no material previously published or written by another person (except where explicitly defined in the acknowledgements), nor material which to a substantial extent has been submitted for the award of any other degree or diploma of a university or other institution of higher learning.

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PhD Candidate

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Ethics approval

AUT University Ethics Committee (AUTEC) approved the ethics application for this research on 19 December 2014. Application number 14/385 (see Appendix 1).

Chapter 1 Introduction

1.1 Background

Since the 1990s, marketing scholars have intensified their focus on the marketing department's capabilities, characteristics, roles, and decision-making responsibilities (Day, 1992; Leeflang, Verhoef, Dahlström, & Freundt, 2014; Webster, 1992). These studies have often been responses to concerns academics have had regarding a decrease in the marketing department's influence in firms (e.g., Homburg et al., 2014; Moorman & Rust, 1999; Verhoef et al., 2011). While extant studies provide useful insights into various aspects of the marketing departments and their influence, further research into the work of marketing specialists is required (cf. Dibb et al., 2014). For instance, despite being one of the earliest recognised determinants of firm performance (Shaw, 1912), there is currently a lack of research on marketing specialist knowledge.

Additionally, previous studies have shed little light on *how* marketing specialists use their knowledge and *how* and *why* this knowledge is influential. Previous, studies have examined determinants of the marketing department's influence using approaches such as institutional (Homburg, Workman Jr, & Krohmer, 1999), contingency (Göetz, Hansen, Jo, & Krafft, 2009; Wu, 2004), power (Merlo, 2011), and departmental perspectives (e.g., Moorman & Rust, 1999; Verhoef & Leeflang, 2009). These studies present determinants of the marketing department's influence, such as being innovative, accountable, or networked (Merlo, 2011; Verhoef & Leeflang, 2009), as universal axioms described by some as devoid of human life and social practice (e.g., Svensson, 2007). What is missing are the active sense-making and social interactions that marketing practitioners engage in daily (Ardley & Quinn, 2014). Therefore, research into marketing specialist knowledge, how they use their knowledge, and how and why it influences others is warranted.

1.2 Research problem

Hence, this study examines marketing specialist knowledge and its influence using Practice Theory, a theoretical lens by which the practitioner, their practices, and praxes are investigated (Whittington, 2006). The research problem is stated:

How and why does marketing specialist knowledge influence firms and their performance?

Furthermore, in line with previous Practice Theory research (cf. Jarzabkowski & Spee, 2009), marketing specialist knowledge and its influence will be investigated at three levels: influence among marketing specialists, the firm, and the market. The marketing specialist level refers to the *micro level*, where the practices and praxis developed by marketing specialist knowledge

influences other marketing specialists. The firm-level refers to the *mezzo level*, where the practices and praxis developed by marketing specialist knowledge influences those of their firm or non-marketing colleagues or stakeholders. The market level specifies the *macro level*, where practices and praxis developed by marketing specialist knowledge affect their market, which includes their competitors.

By introducing Practice Theory to address the knowledge and activities of marketing specialists, two relevant research questions can be stated:

RQ1: What are the practices marketing specialists draw on to plan, develop, implement, and appraise a marketing project?

RQ2: How and why their practices and praxes are influential at the marketing specialist, firm, and market levels?

In answering the research questions, the following research objectives will be met:

1. To classify the main knowledge domains of marketing specialists
2. To identify marketing specialists' practices as they:
 - a. plan
 - b. develop
 - c. implement
 - d. and appraise a marketing project
3. To determine the constitution of each of the practices identified
4. To determine how these practices are used in the marketing specialists' thinking and decision-making processes
5. To determine the marketing specialists' praxes at three levels, specifically:
 - a. among other marketing specialists
 - b. their firm
 - c. and their market
6. To determine how and why the marketing specialists were influential at these levels.

1.3 Justification for the research

Previously, there has been considerable development in the conceptual and theoretical frameworks regarding marketing's influence (e.g., Nath & Mahajan, 2011; Srivastava, Shervani, & Fahey, 1999). However, research has had mixed results, with some justifying (e.g., Day, 1992; McDonald, 2009; Rust, Ambler, Carpenter, Kumar, & Srivastava, 2004), and some allaying the concerns academics have regarding conventional marketing department tasks being devolved to other departments (Feng, Morgan, & Rego, 2015; Moorman & Rust, 1999). For example, Day (1992) predicted that the increase in market orientation within firms would lead to a decrease in marketing department influence. Also, McDonald (2009) and Rust et al., (2004,

p. 74) expressed concern that the marketing department's lack of justification for marketing expenditure may 'threaten marketing's existence'. Whereas other literature asserts that the influence of strong marketing departments is essential for the positivity of both a firm's market orientation and their performance (e.g., Göetz, Hoelter, & Krafft, 2013; Verhoef et al., 2011). Overall, researchers agree that there is a need for more research on the topic of marketing department influence, particularly regarding its effect on firm performance and market orientation (Feng et al., 2015; Homburg et al., 2014; Leeflang et al., 2014). Further, one of the Marketing Science Institute's (2018, p. 15) 2018-2020 research priorities is to "how can marketing enhance its voice in the C-suite", which is an influence-based topic. Also, requests for in-depth research investigating various work-life aspects within the marketing role have also been made (Dibb et al., 2014; Jaworski, 2011; MSI, 2012). Therefore, the culmination of these calls for further research on the roles within, and influence of, the marketing department justify the need for further study.

1.3.1 Research on the influence of marketing practitioners

Further investigation into the influence of marketing practitioners is needed for several reasons. First, there is a lack of research regarding what marketing specialists do (Svensson, 2007), particularly within the marketing influence literature. Further, studies on what marketers do within firms are rare (Dibb et al., 2014; Skålén & Hackley, 2011), with scant attention to "what is marketing work" (Svensson, 2007, p. 275). Jaworski (2011, p. 212) asserts that academia currently has only "superficial, outdated knowledge of marketing roles and positions within firms". Moreover, Skålén and Hackley (2011, p. 189) argue that marketing research has predominantly been "ideologically driven" as well as normative and prescriptive. Moreover, these authors raise concerns over "the relative lack of 'bottom-up' empirical research into how marketing is actually done in organizations" (Skålén & Hackley, 2011). A lack of inductive research of the specific activities of marketers in organisations also concerns those who would like more concrete descriptions of what marketers do (Skålén & Hackley, 2011; Svensson, 2007; Webster, 2002). Such descriptions would provide ground-level data which may further illuminate and justify the influence and value of marketing specialists in today's firms. By studying marketing specialist knowledge using case studies, this research would further uncover what marketing practitioners do within their work-life. Moreover, as the case-studies involve interviews with the marketing practitioners' senior managers, colleagues, subordinates, and stakeholders, a comprehensive and holistic perspective could emerge.

This study seeks to investigate the influence of marketing specialist knowledge at practitioner-level using a specific theoretical lens, namely Practice Theory. Practice Theory invites researchers to "dive deep into organisations to engage with [marketing's] activity in all its intimate detail". (Whittington, 2006, p. 613). This approach obligates the investigator to examine the micro-level perspective on the influence of specialist marketer knowledge.

Moreover, this approach explores how, why, and where marketing specialist influence is felt at social and market levels, capturing the practical sense in which influence is generated and carried out (Bourdieu, 1990). Also, practice theorists analyse “rich understandings of situated phenomena” that underpin the outcomes of practices (Jarzabkowski & Spee, 2009, p. 23). Hence, investigating marketing specialist knowledge using Practice Theory will provide new insights into how new marketing projects emerge, how they influence and profit the firm (Morgan, 2012), and shape markets (Araujo, Kjellberg, & Spencer, 2008).

Whether the influence of marketing departments is decreasing or not, further understanding regarding the knowledge and influence of marketing specialists is critical both to firms and academia. Further investigation may shed light on crucial determinants hitherto not considered in marketing influence literature. These determinants may relate to the capabilities found within marketing departments, relationships between marketing departments and others, and previously unknown determinants related to market orientation and the market environment. Therefore, future research into the marketing department or marketing practitioner studies may adopt more comprehensive determinants which emerge from this qualitative study.

1.4 Methodology

The research design in Chapter 3 provides a detailed account and justification for the case study methodology used for this study. Case studies are a qualitative approach where the researcher examines real-life contemporary bounded systems through detailed, in-depth data collection involving multiple sources of information to answer research questions (Creswell, 2012; Yin, 2009). From the methods available, case studies were selected due to their likelihood in yielding rich, thick descriptions of marketing specialist knowledge and their influence as they carried out a marketing project (Creswell, 2012; Yin, 2009). Considering the overall research design, a case study methodology complemented Practice Theory due to both approaches' emphasis on investigating situated phenomena at a practitioner level (Echeverri & Skalen, 2011; Eisenhardt & Graebner, 2007; Jarzabkowski & Spee, 2009).

The firms selected for this research were medium to large firms that employed marketing specialists who had either recently or were in the process of completing a marketing project. Although the marketing projects differed from case to case, they were all significant undertakings for each firm and were entrusted to the marketing specialists to plan, develop, implement, and appraise. The marketing projects included external marketing ventures such as advertising campaigns and rebranding programs, as well as internal marketing ventures which introduced significant cultural and behavioural changes to their firm.

Four firms were purposively selected from various industries in New Zealand. First, Tourism Bay of Plenty is a regional tourism organisation who underwent a rebranding project after a shipping disaster had significantly reduced tourism in the area. Second, Zespri is an

international horticultural company who, after conducting extensive consumer research, developed an internal marketing project incentivising their orchardists to produce sweeter kiwifruit for export. Third, Trustpower is an energy and telecommunications retailer whose unique capability of bundling power, broadband, phone, and gas utilities into one product, developed marketing projects aimed to penetrate metropolitan centres. Fourth, The InterCity Group is a national bus service operator who underwent a rebranding project. The diversity of industries and marketing projects assisted in determining and justifying the collective knowledge domains, practices, praxes, and subsequent influence the marketing specialists shared across the cases.

Regarding data analyses, semi-structured interviews, focus groups, reflective journals, and a collection of relevant artefacts such as briefing, proposal, and promotional materials were gathered. To achieve a holistic narrative, participants included marketers, general managers, board members, frontline and operations staff, and third-party consultants and stakeholders. The collected data consisted of 20 one-on-one interviews, four focus groups with a total of 16 participants, and four marketing managers' reflective journals, plus artefacts relating to their marketing projects. By collecting data from various sources using several methods, the inquiry gathered diverse perspectives regarding the marketing specialists' knowledge, thinking processes, and their influence throughout their projects.

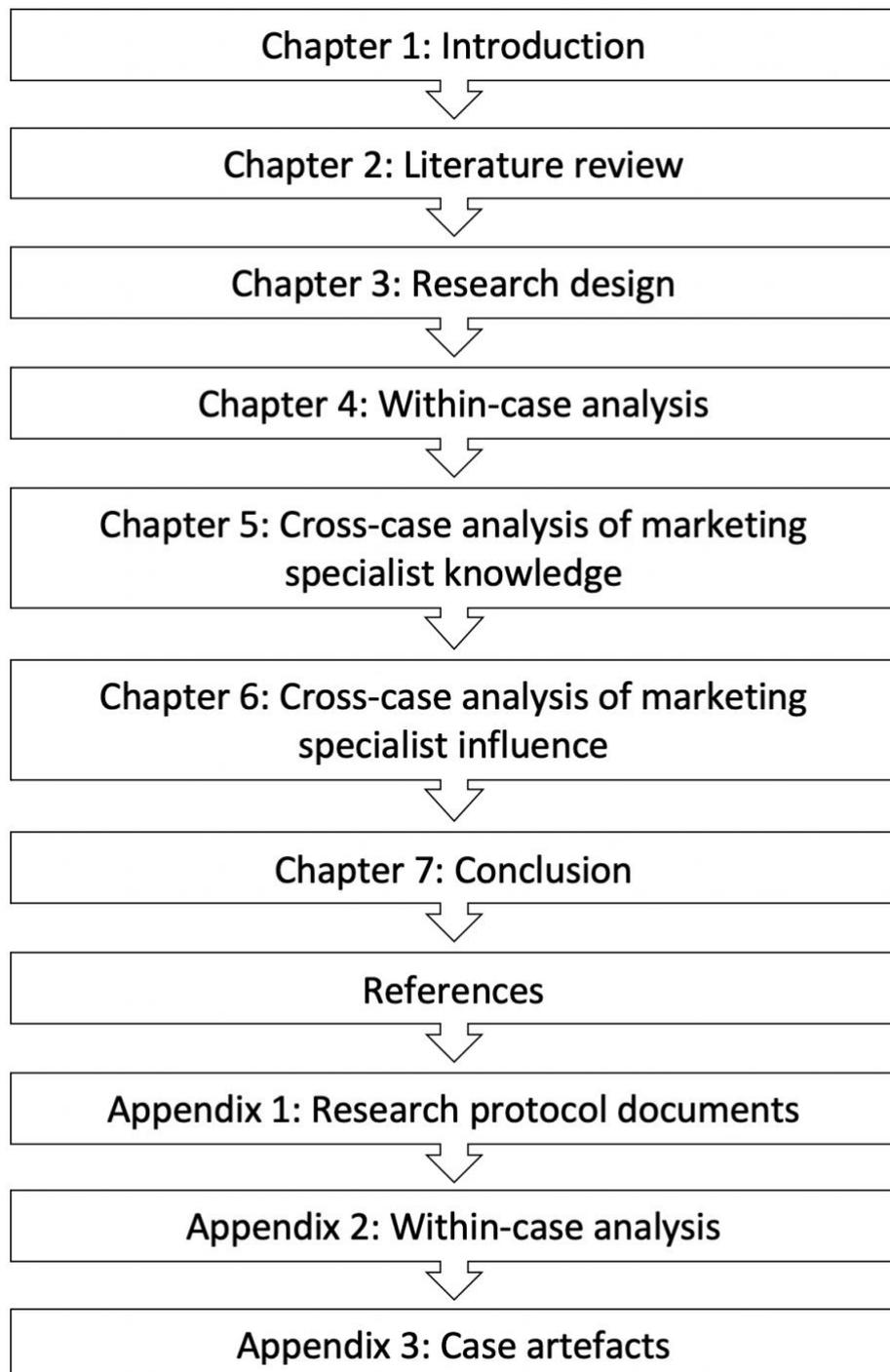
The data analysis was conducted in three main parts, which are documented in Chapters 4, 5, and 6. In each of these Chapters, transcripts from the semi-structured interviews and focus groups, responses from the reflective journals, and artefacts from each firm were carefully analysed. Chapter 4 is a within-case analysis which examines two main topics, the marketing specialists' knowledge and their influence within their project and setting. Here, the marketing specialists' knowledge was examined in four areas within each case: the planning, development, implementation, and appraisal of their marketing project. Next, the marketing specialists' influence was examined at three levels with each firm: at the marketing specialist level, the firm level, and the market level. Chapter 4 laid the groundwork for the practice-approach used in Chapter 5 and 6, in which the shared or routinised activities, or practices and praxis of marketing specialists would emerge.

Ergo, Chapter 5 is a cross-case analysis of the four firms which aggregates the marketing specialists' knowledge and how they were constituted using a Practice Theory lens. The five marketing specialist knowledge domains derived from the literature review served to classify each of the different practices marketing specialists drew from when carrying out their marketing work. Moreover, the levels the marketing specialists' knowledge operated at, whether the marketing specialist, firm, or market level, also served to distinguish how their practices emerged. As is typical of Practice Theory methods, findings were expressed as gerunds to "highlight the active and constitutive nature of practices" (Jarzabkowski & Spee, 2009, p. 18).

Hence, marketing specialist practices that constitute each knowledge domain were identified and discussed at their appropriate level (cf. Jarzabkowski & Spee, 2009). Additionally, the knowledge the marketing specialists derived from internal and external sources, including consultants, are also discussed, followed by findings related to their thinking and judgement-making processes.

The analyses, development, and subsequent findings regarding the marketing specialists' knowledge and thinking processes continues into Chapter 6, which is a cross-case analysis of the marketing specialists' influence. Specifically, this chapter uses Practice Theory to investigate marketing specialist praxes and subsequent influence at the marketing specialist, firm, and market levels. In doing so, the cross-case analysis concludes by providing a practice-based perspective which maps marketing specialist knowledge through to its influence at each specific level.

1.5 Outline of the thesis



1.6 Contributions of the research

1.6.1 Conceptual contribution

This research aims to contribute important conceptual, methodological, empirical, and managerial material to academic knowledge in marketing.

1.6.1.1 Practice Theory and knowledge domains

First, this study's conceptual contribution begins in Chapter 2 by proposing a framework that links the practices of marketing specialist knowledge to its influence. Specifically, Chapter 2.4 discusses how Practice Theory is a cogent lens to investigate marketing specialist knowledge and how and why it is influential within firms. In doing so, the review describes how Practice Theory might be further conceptualised in future practice-based studies in three ways. First, Practice Theory is typically described as practitioner activities which are drawn from the various socially defined practices which inform their activity. However, Section 2.3.2 also introduces a new concept to Practice Theory, i.e., knowledge domains, a meta-level categorising how the marketing specialists' practices were categorised. For example, the marketing specialist practices of conceptualising were derived from the knowledge domain of marketing expertise. In other words, the various marketing specialists' knowledge domains help classify how the marketing specialist's practices were informed.

1.6.1.2 Practice Theory and projects

Second, Practice Theory has an accepted overarching conceptual framework consisting of the practitioner, their practices, and their praxis (Whittington, 2006). While preserving this framework, Chapter 2 adds another contextual parameter. Here, the term 'project' was added, focusing the investigation upon the specific type of work the marketing specialists were undertaking. Hence, this research focused on the practitioner, their practices, and their praxis within the context of their project.

1.6.1.3 Marketing specialists: marketing managers and consultants

Third, the term 'marketing specialist' used in this research includes both the marketing managers and marketing consultants who worked on the projects in each case. To determine practices and praxes they share, these internal and external marketing practitioners are all considered 'marketing specialists'. However, when necessary, their roles are distinguished from one another throughout the findings. Thus, rather than consider the marketing manager only, this study considers how and why all the marketing specialists, with their different backgrounds, influenced their project. Since they were all working on the same projects, this contribution provides a comprehensive perspective of the knowledge and influence of marketing specialists, rather than solely a marketing manager view.

1.6.1.4 Linking marketing specialist practices, praxes, to their influence

The marketing specialists' practices and their praxis are treated as antecedents of their subsequent influence at three levels, namely among themselves, their firm, and their market. Further conceptual contributions in Chapter 5 and 6, detail the practices found within marketing specialist knowledge, and how and why these practices were influential at the levels mentioned above. In doing so, this investigation shows how the marketing specialists' knowledge domains,

practices, praxes, and subsequent influence among other marketing specialists, their firm, and their market are linked.

1.6.1.5 Thinking processes of marketing specialists

The literature discusses ways in which thinking can be conceptualised (Evans, 2011; Heijltjes, Van Gog, Leppink, & Paas, 2014; Kahneman, 2011; Stanovich, West, & Toplak, 2011), and processed (e.g., Klebba & Hamilton, 2007), and used for creative means in a business context (e.g., Kilgour & Koslow, 2009). This study further contributes to this area by considering the marketing specialists' thinking processes from a practice perspective.

1.6.2 Methodological contribution

Regarding its methodological contribution, this research adds to the growing field of Practice Theory in marketing (Skålén & Hackley, 2011). As well as adopting a Practice Theory approach, this paper adds to the marketing influence literature by conducting case studies. The case studies examined and reported on the sayings and doings of marketing specialists concerning their cognitive, social, and technical activities. Subsequently, the findings provide an in-depth work-life and practice-based perspective regarding marketing specialists and their interactions at the various levels they influenced. By investigating this topic inductively, previously unconsidered determinants in marketing influence literature emerged and may be examined in future quantitative research. Hence, semi-structured interviews and focus groups with marketers, general managers, board members, frontline and operations staff, and third-party consultants and stakeholders was crucial in collecting a holistic narrative. Moreover, reflective journals completed by the marketing managers and the collection of relevant marketing collateral and communication artefacts was also crucial in establishing this research's contributions.

1.6.3 Empirical contribution

The four case studies were designed to lead to coherent, holistic findings on the influence of marketing specialist knowledge. By interviewing CEOs, marketing specialists, as well as non-marketing and third-party specialists integral to developing the marketing project, key perspectives were readily substantiated. Hence, findings are likely to contribute to a conceptual framework that helps fill gaps in our understanding of the knowledge, practices, and processes marketers use to contribute to firm performance. These findings may also provide fresh empirical perspective on the complementary relationship between marketing specialists and their firm's market orientation (Verhoef et al., 2011).

1.6.4 Managerial contributions

A practice-based perspective of marketing specialist knowledge and influence may provide and consolidate new insights and perspectives into their role within firms. These insights may assist

managers in clarifying particular knowledge domains and practices they desire when hiring a marketing practitioner, which apply to new or experienced marketing employees, consultants, or agencies. Further, managers may better understand their marketing department's role based on the knowledge domains and practices identified and their relevance to the roles and relationships that marketing specialists are engaged. Moreover, these findings may illuminate the importance of specialist knowledge and exhibit their distinctive value to firm performance. Hopefully, further understanding of the marketing specialists role will see a reversal of the short-term tactical roles reportedly issued routinely to marketing departments and be replaced with more strategic responsibilities (Merlo, Lukas, & Whitwell, 2012). Also, while market orientation is a commendable approach, the distinction, characteristics, and value of specialist knowledge to firms, albeit the marketing practitioner's, is the central thesis of this research. While Glazer suggests that marketing has "become too important to be left to the marketing function" (1991, p. 17), this study's riposte is that marketing is also too valuable to leave to non-specialists. Therefore, the final managerial contribution is to highlight the critical and complementary approach between marketing orientation and marketing departments.

The findings describe practices that marketing specialists draw upon, how creative and innovative ideas emerge, how practices influence and profit the firm, and how they shape markets. Therefore, this study may help marketing specialists and those around them better understand, appreciate, engage in, and improve their marketing practices. Additionally, findings regarding marketing specialist knowledge and influence, and insights into their activities and interrelationships within their work-life may provide essential contributions to marketing teaching content and materials. Marketing academics have expressed concern over marketing textbooks' accuracy in reflecting the role and activities of marketing practitioners (Dibb et al., 2014). While the argument of the academic-practitioner divide is not new, the gap between both parties requires addressing continuously (Lilien, 2011), which has implications for the marketing teaching profession. For instance, Dibb et al., (2014) advocate that marketing is likely to expand its authority over the marketing role by producing teaching materials that depict the routinised activities of marketing practitioners. Findings from this study may contribute by providing resources that the marketing teaching fraternity could find useful. These resources include case studies, testimonies of how and why marketing specialists were hired or contracted, and findings that discuss marketing specialists' knowledge, and how and why it was influential. This contribution to marketing teaching materials may assist business students to understand various marketing specialists' knowledge, roles, and activities attributed to improving a firm's performance.

1.7 Limitations

As with any investigation, this study has several potential limitations. First, this research is investigating 'how' and 'why' research questions. Therefore, this research did not intend to list and describe every instance of marketing expertise, organisation familiarity, market intelligence, leadership, and life experience the marketing specialist demonstrated within their project. Also, rather than ask participants to retell what they perceive marketing specialist knowledge to be, this research investigates this topic in the context of a particular marketing project. While limited to a specific project, projects themselves draw on many facets of the marketing specialist's knowledge. The point of focusing on a specific project is not to limit the number of practices that emerge. Rather, this approach seeks to provide rich and in-depth descriptions from the participants' recent or relevant experience. It follows then that the topic is examined mainly at an operational level, with little focus on how marketing specialist knowledge is influential at a strategic level. However, the influence of marketing specialist knowledge on the strategic intent of the firm still emerged within the interviews. Future research might examine marketing specialist influence as a strategic dialogue within the firm when developing their firm's vision and strategic intent, rather than limited to marketing projects.

The limitations regarding case types was purposive, in that each case had significant points of difference from the others. The firms' size, the purpose of their project, and the industry they were in were considered in order to collect differing perspectives on marketing specialist knowledge and its influence. The purpose of this approach was to collect data from various sources for literal replication (Perry, 1998). However, an approach involving similar cases, for instance where types of firms, e.g., FMCGs, and types of projects, e.g., brand repositioning, were identical may have provided deeper, more characteristic findings. Although finding four such cases in a given period may have proven daunting.

Also, the research was further constrained in that firms whose marketing direction was sourced from overseas were rejected, as the study called for investigating a project conceived in-house. Likewise, firms who did not have a marketing manager were not considered suitable despite their consultants having implemented a recent marketing project.

1.8 Conclusion

This chapter has outlined the main topics of this thesis. It has presented the research's background, problem, and aims, as well as justified its need. Moreover, this chapter has discussed the methodological approach it has adopted and provided an outline of each of its chapters, contributions, and limitations. Next, Chapter 2 provides the foundational literature for this thesis.

Chapter 2 Literature review

2.0 Introduction

Various concerns researchers have over the marketing department's influence have attracted a broad avenue for research into the value of marketing departments to firms. This research seeks to add to this vein by investigating marketing specialist knowledge and its influence. Section 2.1 reviews the literature which, over 15 years, quantitatively addresses the marketing department's influence within firms using multiple approaches. Due to this research's focus on marketing specialists, Section 2.2 considers current studies regarding marketing practitioners, uncovering how little research has been done on this topic. Following on, Section 2.3 examines current marketing and management literature to determine the main knowledge domains of marketing specialists, as well as how they process their knowledge. Following on, Section 2.4 discusses Practice Theory and its use, constitution, and application to this research. Section 2.5 presents the research question and is followed by Chapter 2's conclusion in Section 2.6.

2.1 Marketing's influence within firms and their performance

Studies show that the marketing department needs to be influential if firms want to deliver a positive business performance long-term (Homburg et al., 2014; Moorman & Rust, 1999; Wirtz, Tuzovic, & Kuppelwieser, 2013). Researchers have identified several drivers of the marketing department's influence within firms. First, marketing capabilities, such as innovation, accountability, customer connecting, and integration with other departments, bear significant leverage concerning the marketing department's influence (e.g., Moorman & Rust, 1999; Verhoef et al., 2011). Second, sources of power, namely bureaucratic, critical contingencies, and network power have also been found to positively affect the marketing department's influence, although psychological power does not (Merlo, 2011). Third, specialised knowledge and skills play a vital role in constituting the marketing department's influence (Gray, Ottesen, Bell, Chapman, & Whiten, 2007; Moorman & Rust, 1999; Walker et al., 2009). Also, external sources of influences for the marketing department include the degree of market growth and uncertainty (Urbonavičius & Dikčius, 2009). Finally, specific characteristics of the firm, such as whether or not the CEO has a marketing background, the firm's strategic approach (Verhoef & Leeflang, 2009), and organisational structure (Göetz et al., 2009) contribute to the marketing department's influence.

When investigating factors relating to marketing department influence, the above studies were addressing both the potential and reported decline of the marketing departments influence in firms. In doing so, these studies examined determinants of the marketing department's influence using several approaches. These approaches include adopting institutional and departmental

perspectives (Göetz et al., 2013; Homburg et al., 2014, 1999; Moorman & Rust, 1999; Verhoef & Leeflang, 2009; Verhoef et al., 2011; Wirtz et al., 2013), contingency (Göetz et al., 2009; Wu, 2004), cultural (Engelen & Brettel, 2011), and power perspectives (Göetz et al., 2009, 2013; Merlo, 2011).

However, the findings relating to the marketing department's influence, such as being innovative, accountable, and networked, are described as universal axioms devoid of human life and social practice (Svensson, 2007). What is missing are the active sense-making and social interactions that marketing practitioners engage in daily as they influence others (Ardley & Quinn, 2014). Brownlie and Hewer (2011) claim that investigations into what marketing specialists do may provide avenues of insight into their reflexive struggles and inventiveness. Insights at this level should further inform our understanding of how skills, capabilities, competencies, and expertise are constituted, illuminating ways in which marketing specialists are influential.

Furthermore, current marketing literature has only indirect references to marketing specialist knowledge as an aspect of the marketing department's influence. For example, Moorman and Rust (1999) refer to the marketing department's specialised knowledge as a driver of firm performance. Moreover, little attention is paid to marketing specialist knowledge and its influence in and on the firm and marketplace, although inferences are provided in studies regarding strategic decision-making literature (e.g., Homburg et al., 2014, 1999). Further understanding of marketing specialists' knowledge and the influence it may have, would go some way to answering calls for "bottom-up" research on the influence of the marketing discipline (Skálén & Hackley, 2011, p. 189). Therefore, a major gap in the marketing influence literature is an understanding of the active sense-making and social interactions that marketing specialists engage. Understanding of their knowledge and influence might shed further light on the marketing practitioner's effectiveness within the firm and the firm's performance.

Researchers have identified several factors that may affect the marketing manager's influence within the firm. First, influential factors include the marketing manager's capabilities in interacting, resource allocating, organising, and developing informal communication structures within the firm (Bonoma & Crittenden, 1988). Other factors include the resistance to change or non-cooperation from key personnel, politics surrounding resource allocation, and a lack of consensus on marketing proposals (Piercy & Morgan, 1994). Third, marketing specialists may not have sufficient cognitive capabilities, may not recognise viable alternatives, may lack innovation, and rely on textbook processes in their work-life context (McDonald, 1996). Moreover, factors such as the decision-making autonomy of the marketing specialist and their synergy with other functions also relate to their influence (Walker & Ruekert, 1987).

Importantly, as firms have adopted a market orientation approach, the reported effect has been a multifaceted and tenuous erosion of the marketing department's influence upon their firms (see

Greyser, 1997; Kotler & Keller, 2012; Nath & Mahajan, 2011; Verhoef & Leeflang, 2009; Webster, Malter, & Ganesan, 2004; Workman Jr, Homburg, & Gruner, 1998).

2.1.1 Marketing departments' reported declining influence

Traditional marketing roles such as pricing, advertising, budgeting, distribution, and new product decisions are reportedly been devolved to personnel in non-marketing roles (Hagberg & Kjellberg, 2010; Webster et al., 2004). These marketing roles have been adopted by sales, finance, technical, and product engineering departments, as well as third-party marketing consultants and flexible labour hire (e.g., Argyriou, Leeflang, Saunders, & Verhoef, 2009; Homburg et al., 2014). With a market-oriented approach, various personnel take on marketing roles within the firm and the need to distinguish marketers from non-marketers seems not only trivial but counterproductive (Hagberg & Kjellberg, 2010; Jaworski & Kohli, 1993). It is not that Marketing as a philosophy is losing its influence. Instead, firms have shifted significantly from a siloed or departmental approach to a firm-wide marketing approach (Day, 2011; Doyle, 1995; Ellis, 2006; Wirtz et al., 2013). While Day (1992) argues that an increase in the firm's market orientation spells a decline in the firm's marketing department size and influence, it does not spell the marketing department's end. Day envisioned that a market orientated approach "may lead to the eventual subordination of the marketing function to a supporting role", rather than the end of the marketing department altogether (Day, 1992, p. 327).

However, the perceived paradox between the firm's marketing department and the market orientation appears to be superseded by an understanding of the marketing concept's dual approach in enhancing firm performance (Drucker, 1954; McKitterick, 1957; Moorman & Rust, 1999; Verhoef et al., 2011; Webster, 2009). A firm's performance can only be sufficiently understood when marketing's functional and orientation perspectives are both accounted for (Homburg et al., 2014; Merlo & Auh, 2010). Further, a strong marketing department and a market orientation are reportedly mutually dependent (Göetz et al., 2009, 2013), with both entities positively affecting each other as well as the firm's performance (Moorman & Rust, 1999; Verhoef et al., 2011; Wirtz et al., 2013). Additionally, the literature suggests that a strong marketing department fosters market orientation due to its extensive knowledge of the market and its ability to diffuse this knowledge throughout the firm (Homburg et al., 2014). As well as the marketing department and market orientation influencing firm performance, third-party specialist marketers may also play an important role (Argyriou et al., 2009; Doyle, 1995; Lusch & Webster, 2010).

2.2 Marketing specialist knowledge

A review of the literature regarding marketing influence uncovered two major findings. First, marketing influence literature focusses almost exclusively on the marketing department rather

than the marketing specialist (e.g., Merlo, 2011; Verhoef et al., 2011). Second, marketing specialist knowledge and its processing likely play a significant part in constituting the marketing specialist influence (cf. Homburg et al., 2014; Verhoef et al., 2011). Also apparent are the marketing academics calls for further research regarding marketing practitioners' work-life (e.g., Ardley & Quinn, 2014; Dibb et al., 2014). Hence, further investigation into marketing specialist knowledge and how it is processed during marketing projects and its influence during a work day is in effect uncharted but fertile territory.

Beginning with the topic of knowledge, this section discusses knowledge's nature and qualities from philosophical, marketing, and management perspectives respectively. Next, the literature on marketing capabilities, skills, and competencies are reviewed followed by the flaws encountered when applying competency-based studies upon marketing specialists. Following on, marketing and management literature are reviewed to determine the likely knowledge domains marketing specialists draw from during their working day. This section concludes by examining our understanding of how knowledge is processed. Here, the rational and critical thinking processes marketing specialists are likely to undertake are discussed. This section consolidates relevant literature which discusses marketing specialist knowledge and focuses upon how marketing specialist knowledge is processed and ultimately influential.

2.2.1 What is knowledge and knowing?

From antiquity, various views regarding the nature of knowledge and knowing have been posited. From early conceptualisations of knowledge, philosophers, psychologists, and others have attempted to further our understanding of the nature of knowledge. Aristotle defined knowledge as a result of *episteme*, *techne*, and *phronesis* interweaving (Tooman, Akinci, & Davies, 2016). *Episteme* represents the informed, data-driven, evidence-based, scientific knowledge or information, whereas *techne*, depicts the hands-on, skilful capabilities such as those of a craftsman or artist. Next, *phronesis* encompasses wisdom and judgement, which includes one's relevant cultural, ethical, and moral context. From the Aristotelian perspective, knowledge is not found severally in these domains, but by their coalescence; therefore knowledge was conceptualised as the aggregation of knowing, doing, and a contextual understanding (Tooman et al., 2016).

From the mid 20th century, the nature of knowledge was posited in several ways. First, knowledge was described as having two distinct dimensions; *knowledge of acquaintance* and *knowledge about*. *Knowledge of acquaintance* relates to knowledge by experience and is acquired by doing. *Knowledge about* relates to knowledge that is developed through study and learning; which considers the principles that underlie an experience sans-subjectivity (James, 1950). Building upon these typologies, knowledge was further distinguished as being either objective or tacit. Objective knowledge, being knowledge of unbiased reality, can be easily written down and shared, whereas tacit knowledge is personal and contextual, and at times not

readily articulated (Polanyi, 1962). However, although Polanyi (1962) describes the personal nature of knowledge, Wittgenstein (1953) suggests that all knowledge, in essence, is fundamentally collective.

Conflicts regarding the nature of knowledge might in part be attributed to the varying contexts knowledge has been considered, or the positivist to constructivist paradigms underlying each discipline's view. Within the social science disciplines, knowledge is more complex and is a term used in divergent and conflicting ways; one's conceptualisation of knowledge depends on one's ontological and epistemological perspectives. Here, while one may consider knowledge as viable when concrete and measurable, others consider knowledge to be the product of social construction. Moreover, methods to determine knowledge vary; while one may look for knowledge in findings from statistical analysis, another may extract meaning from the words and actions of others (Tooman et al., 2016). Essentially, the social science discipline raises more questions about the nature of knowledge than answers, asserting, "what counts as knowledge is complex, challenging, and contested" (Tooman et al., 2016, p. 17).

More recent managerial conceptualisations suggest that knowledge sits within a progressive linear process which begins with data, information, knowledge, and proceeds to wisdom (Greenhalgh, 2010; Tsoukas & Vladimirou, 2001). As shown, knowledge is distinct from data and information and is a critical component of wisdom, i.e., making judgements, drawing distinctions, and imbuing context within meaning (Tooman et al., 2016). Here, knowledge is connected to a practice in a particular context, where the knower, their data, information, and their context coalesce (Tooman et al., 2016). This conceptualisation of knowledge is described as knowledge-in-practice or *knowing* (Tooman et al., 2016, p. 19), which is discussed further in the Practice Theory section in Chapter 2.4.

Various models, specifically the linear, relational, and systems approaches (Best & Holmes, 2010), clarify differing conceptualisations of how knowledge may be appropriated within organisations. Within the *linear* approach, knowledge is produced and disseminated to users, whom in-turn implement it; here knowledge is a product that moves through predictable, manageable steps toward its utilisation. Next, the *relational* approach incorporates the linear approach but further considers the relational and interactive nature of the people sharing the knowledge. Therefore, while knowledge may come from sources of credible research, its adoption and subsequent use rely on the interactions and collaborative attitude of others involved. Following on, the *systems* approach incorporates the linear and relational approaches and also recognises knowledge sharing is shaped, embedded and organised through various structures and worldviews, languages, and communicative means. In other words, the linear and relational approaches are contingent on contextual systems which, in turn, are shaped by an organisation's culture, structure, priorities, and resources. In sum, knowledge is examined from its production, dissemination, and use being contingent or interdependent upon its relational and

structural contexts (Best & Holmes, 2010). Central to this conceptualisation is that it is people who are both shaped and shape the relational and structural contexts shown (Tooman et al., 2016). Similarly, marketing specialists, among other practitioners, are likely to receive and disseminate new knowledge throughout their firm, whose success is dependent on the relational and structural contexts they influence.

Despite the various conceptualisations of knowledge and its nature, organisational theorists agree that knowledge is critical in helping people learn how to solve a problem or complete a task (Nonaka & Von Krogh, 2009). As McDonald (1989) asserts, without an understanding of some of the necessary marketing tools, as well as interpersonal and communication skills, the chances of developing a sustainable marketing project are slim. Furthermore, Harrigan and Dalmia (1991) argue that 'knowledge workers', or the individual marketing specialist's use of known marketing models may also be a source of competitive advantage. However, though marketing specialist may have sufficient marketing knowledge, they may lack leadership, relational qualities, or structural support to follow through on useful market intelligence (Ashill, Frederikson, & Davies, 2003).

2.2.1.1 Academic marketing knowledge

Describing marketing knowledge as the foundation of the marketing discipline, Rossiter (2001) distinguishes four of its forms which are both taught and drawn upon when conducting marketing planning. These four forms of marketing knowledge are marketing concepts, structural frameworks, strategic principles, and research principles (Rossiter, 2001). As the building blocks of marketing knowledge, marketing concepts describe the attributes that make up each of the other forms (Rossiter, 2001). For instance, market segmentation is a marketing concept that consists of several attributes, one of which is dividing the market into sub-groups (Rossiter, 2001). Other marketing concepts include pricing, strategy, product and services, and distribution (Rossiter, 2001). Structural frameworks, such as the 4Ps of the marketing mix, are clear concepts that assist marketers in developing marketing solutions (Rossiter, 2001). Strategic principles are prescriptive managerial actions that are recommended in a given situation, and describe a causal relationship between marketing concepts (Hunt & Madhavaram, 2006; Rossiter, 2001). For instance, if specific market attributes are identified, e.g., price-sensitive customers, then a particular strategy, e.g., production rather than market orientation, is prescribed (Rossiter, 2001). The final marketing knowledge form, research principles, are also conditional, prescribing to the marketing academic the appropriate research instruments (Rossiter, 2001). Examples of research instruments include surveys, interviews, and focus groups, with research principles prescribing the best technique for a given research question (Rossiter, 2001).

Rossiter (2001) also distinguishes marketing knowledge from skill, suggesting an academic might know about research skills, but not possess the skill to carry them out. Here, rewards or

influence based on one's work are not established on what one knows, but on the skills, they enact (Rossiter, 2001). However, Rossiter's (2001) marketing knowledge insights have received criticism for their focus on knowledge within a transactional marketing paradigm, which potentially overlooks key knowledge concepts required within relational marketing approaches (Brodie, 2002).

2.2.1.2 Role of knowledge in business

In business, knowledge has been described as “*the* key strategic asset of the twenty-first century” (Carud, 1997, p. 82). Hence, competitive advantage belongs not to those with only capital and labour resources, but with access to information. This paradigm shift has led to today's economy being described as knowledge-intensive (Glazer, 1991). Consequently, the survival and growth of businesses depend on the acquisition, development, management, and capitalisation of both ordinary or unique forms of knowledge (Madhavaram, Gross, & Appan, 2014). The use of knowledge leads nimble and competitive firms to adapt so that they can capitalise on opportunities and respond to competitors, whether actual or anticipated (Narayanan & Fahey, 1994).

With regards to knowledge's role within competitive firms, one view suggests that firms are essentially a body and processor of knowledge (Grant, 1991). At a departmental or functional level, marketing knowledge was one of the earliest recognised determinants of firm performance and competitiveness (Shaw, 1912; Weld, 1916). At the turn of the twentieth century, while acknowledging the multifaceted nature the marketing discipline, studies called an increase in the study of human nature and psychology (Shaw, 1912), and the marketing process (Weld, 1916). By the end of the twentieth century, the acquisition, development, and management of market and marketing knowledge was widely acknowledged as fundamental to the competitive advantage of firms (Glazer, 1991).

In recent literature, five broad types of knowledge required by firms have been identified; these are know-how, know-why, know-what, know-where, and know-when (Madhavaram et al., 2014). *Know-how* is the knowledge of how to perform a task consistently and is usually learnt by doing and often described as a capability. *Know-why* is the knowledge of principles which underlie phenomena and is often learnt by analysis and often described as a theory. *Know-what* is the knowledge of what phenomena is worth pursuing and is often learnt by understanding customer's needs, a competitor's strategy, or an environmental change. *Know-where* is the knowledge of where to supplement existing knowledge and is often learnt by alliances and networking. Finally, *know-when* is the knowledge of when to adopt new knowledge and procedures. This knowledge-type relates to the timing of firm actions and is often learnt by having industry foresight, the “ability to visualise the direction of tomorrow's market” (Madhavaram et al., 2014, p. 67). Here, the nature of knowledge has moved from philosophical viewpoints toward a more practical conceptualisation for business purposes.

2.2.1.3 Capabilities and competencies and their value to a business

As well as a source of competitive advantage (e.g., Madhavaram et al., 2014), papers investigating marketing knowledge have in the main concentrated on *forms* of marketing knowledge (Rossiter, 2001). These studies have considered knowledge-based topics such as organisational learning and learning orientation in firms (e.g., Baker & Sinkula, 1999; Hart, Hogg, & Banerjee, 2004), market orientation (Kohli & Jaworski, 1990; Narver & Slater, 1990), as well as studies on knowledge acquisition and its leverage for competitive advantage (Cohen & Levinthal, 1990; Sinkula, 1994). Hence, studies into the skills, capabilities, and competencies of marketing professionals have increased in recent times (Gray et al., 2007; Melaia, Abratt, & Bick, 2008; Walker et al., 2009). Capabilities are defined as complex bundles of skills and knowledge embedded in a firm's processes, and provide the firm with the ability to integrate, build, and reconfigure competencies to address a changing marketplace (Grant, 1996; Helfat & Peteraf, 2003). The resource-based view posits that sustainable competitive advantage is achieved through resources that differ in value, rarity, imitability, and sustainability (Barney, 1991). However, the capabilities perspective argues it is the deployment and leveraging of resources that enhance firm performance (Grant, 1996). The embedded and deeply rooted nature of capabilities within firms makes them hard to replicate and therefore a competitive advantage.

Following on, individual competence has been defined as “a skill and the standard of performance reached” (Rowe, 1995, p. 12), whereas competency describes the behaviour by which a performance was reached. Competency as “an underlying characteristic of a person in that it may be a motive, trait, skill, aspect of one’s self-image or social role, or a body of knowledge that he or she uses” (Boyatzis, 1982, p. 21). In management terms, *competence* focuses on what marketers do, while *competencies* describe how they do it (Melaia et al., 2008; Rowe, 1995). Therefore, existing competencies provide a leverage point from which new firm capabilities can develop (Danneels, 2002). Here, the marketing specialist's capabilities and competencies are coupled with their firm's capabilities and ultimately their firm's performance.

Furthermore, business competence forms a significant link between knowledge and competitive advantage (Gupta, Woodside, Dubelaar, & Bradmore, 2009). Business competency is made up of employee knowledge and skill, technical systems, managerial systems, and values and norms (Leonard-Barton, 1992). For instance, marketing capabilities are vital sources of sustainable competitive advantage as they leverage assets, resources, and structures to achieve superior performance in ways that competitors cannot imitate (Krasnikov & Jayachandran, 2008; Wirtz et al., 2013). Studies have also identified that capabilities, such as the marketing discipline’s, that generate revenue increase are more sustainable and more valuable than capabilities that emphasise cost cutting and efficient operations (Zuckerman & Hudson, 2007).

Marketing knowledge is a vital component of firms. Marketing knowledge “provides a core competency consisting of skills, systems and information that convey a competitive advantage

to the firm in terms of identifying market opportunities and developing marketing strategies” (Doyle, 2000, p. 236). Moreover, marketing influence literature either explicitly (Merlo, 2011; Moorman & Rust, 1999), or implicitly acknowledges the key role of marketing specialist’s knowledge in marketing influence (Ardley & Quinn, 2014; Verhoef & Leeflang, 2009). For instance, specialised knowledge was found to be one of the most influential factors for marketers, aligning with the popular notion that ‘knowledge is power’ (Merlo, 2011). The influence of marketing specialists’ knowledge is also implicit within marketing department capabilities, namely innovation and customer connection (Verhoef et al., 2011). Findings regarding the technical and instinctual discourses of marketers also demonstrate the influence they have within firms (Ardley & Quinn, 2014). However, marketing *specialist* knowledge itself has not been a central topic in marketing influence studies. This shortfall exists despite historical assertions that marketing departments must increase its influence to contribute to firm performance beyond that explained by market orientation (Moorman & Rust, 1999).

2.2.1.4 Skills and competencies of marketing specialists

Previous studies have shed light on the skills and competencies of marketing specialists for several reasons. As well as providing a competitive advantage, identifying relevant marketing skills increases the likelihood of recruiting better quality employees (Mathews & Redman, 1996; Melaia et al., 2008; Meldrum, 1996). Notably, these studies show that marketing managers provide firms with qualities that are both distinct and shared with other managers.

Regarding shared qualities, for marketing managers to execute successful projects, they required four types of competencies: interacting, allocating, monitoring, and organising (Bonoma, 1985). Furthermore, the underlying skills needed to implement marketing projects successfully included motivation, knowledge, good facilitation, being tough and fair in allocating reward for effort, and overcoming obstacles (Bonoma, 1985). However, as Day (1986) argues, while the necessity of these skills and competencies are unquestionable, the same qualities are required in managerial roles in general.

Other studies show that marketing managers have distinct subject-expertise within the general competencies that have been discussed (Melaia et al., 2008). For instance, desired in most manager types are competencies such as oral and written communication, interpersonal and persuasion skills, and relationship management. However, some of the underlying skills that constitute these competencies are distinctly marketing ones. For example, marketing communication skills are a desired oral and communication competency, whereas creativity, computer literacy, self-management are examples of shared managerial skills (Melaia et al., 2008). Also, customer and market diversity management and B2B marketing skills are considered distinct marketing skills and make up part of the relationship management competencies of managers (Melaia et al., 2008). In other words, it is the specialised skills and capabilities within the accepted, generalised managerial competencies that distinguish

marketing practitioners from other disciplines. Their distinct knowledge includes understanding global marketing, strategic marketing planning, and their implementation (Melaia et al., 2008). The underlying skills that make up these competencies include global technology utilisation and trends awareness, global marketing skills, service orientation, sales and marketing integration, product development and brand management. As discussed, while these competencies and skills are desired in marketing managers, marketing managers are not considered the sole developer or executor of these tasks within firms.

2.2.1.5 Critical view of competency-based studies

Competency, in the context of social science, is described as “an underlying characteristic of an individual that is causally related to effective or superior performance in a job” (Boyatzis, 1982, p. 21). Competency-based studies are commonplace in management studies as they offer rationalised and simplified determinants or process of performance (Merlo, 2011; Moorman & Rust, 1999; Verhoef et al., 2011). Jobs such as budgeting, compliance, and operational planning, due to their objective, tangible, and technical nature, are suitable subjects for competency studies (Carroll, Levy, & Richmond, 2008). However, the nature and role of the marketing practitioner are typically considered more complex and abstract (Ardley & Quinn, 2014; Svensson, 2007). Consequently, competency studies provide only a fragment of the ambiguities and complexity attributed to the typical marketing role (Ardley & Quinn, 2014; Bolden & Gosling, 2006; Svensson, 2007).

Moreover, the robustness and assumptions of competency studies have been called into serious question in management, leadership, and marketing disciplines (Bolden & Gosling, 2006; Carroll et al., 2008; Harris & Ogbonna, 2003; Skálén & Hackley, 2011). In particular, researchers have criticised the competency studies’ focus on factors such as ‘individual’, ‘causally’, ‘superior’, and ‘performance’, terms which provide the premise of competency’s definition and approach to research (Bolden & Gosling, 2006; Carroll et al., 2008; Chia & Holt, 2006). For instance, Chia and Holt (2006, p. 638) argue that this basis constitutes “methodological individualism”. Here, “the individual agent is credited with primacy, a linear relationship is constructed from intention to intervention, and performance is governed by purpose, principles and co-option” (Carroll et al., 2008, p. 364). While these conditions seem acceptable, Carroll et al., (2008) argue that competency studies tend to focus on individual actors performing in isolation. This claim suggests that the actor's relationships to peers, their training, their company and the environment have not been adequately considered and reported. Moreover, reducing, fragmenting, and distilling the competencies of practitioners assumes that the prescriptive findings can be intelligibly and credibly reconstituted in other settings (Carroll et al., 2008). Therefore, competency studies provide little of what gives a discipline its life, vitality and originality, let alone the “subtle, textured, complex, embodied and highly situated mindset that is required” (Carroll et al., 2008, p. 365). Hence, rather than their competencies,

this research investigates the influence of marketing specialist knowledge as it is processed, practised, and perceived by others within their work-life.

2.2.1.6 Marketing knowledge and its influence on firms

Marketing knowledge provides a valuable constituent in developing a firm's culture, as each firm exists in peculiar and sometimes turbulent circumstances. The term “marketing doctrine” refers to the unique principles based on the collection and aggregation of a firm's experiences, which provide firm-wide guidance on decisions for the market (Challagalla, Murtha, & Jaworski, 2014). A consistent standard of excellence or the strict adherence to branding policies are examples of the guiding principles a firm may adhere to in their decision-making. The firm's marketing doctrine provides a common approach in decision-making where a firm's accumulated and unique marketing principles guide consistency and flexibility within developing or turbulent market conditions. Concerning consistency, high-level decision makers draw from the firm's idiosyncratic marketing philosophy when addressing a market decision, without providing specific details on how to execute (Challagalla et al., 2014). Flexibility to execute allows others in the firm freedom in decision-making to generate novel approaches which adhere to the firm's unique marketing principles.

The collection and aggregation of firm-specific knowledge regarding the market is not the sole domain of the marketing specialist. This myopia would severely restrict the experiences a firm could learn from and hamper the development of guiding principles for the firm. However, without guidance from marketing specialists, firms may not satisfactorily organise, distil, understand, or respond to market data, leading to inappropriate or ad hoc marketing, marketing stagnation, or marketing impulsivity (Challagalla et al., 2014; Webster, Malter, & Ganesan, 2005). Therefore, insufficient guidance from marketing practitioners may lead to dissatisfaction with marketing efforts and scepticism by executives. However, according to Nath and Mahajan (2011), the presence of marketing specialists, specifically a chief marketing officer, does not necessarily guarantee positive outcomes. Although the marketing manager's interconnectedness within their firm, their marketing capital, and principles they embody suggests the role is critical in developing marketing strategy leading to positive performance outcomes (Griffith & Lusch, 2007; Moorman & Rust, 1999; Workman Jr et al., 1998).

2.2.2 Marketing specialist knowledge

As discussed, marketing as a discipline has a vast array of tools and principles shared among practitioners worldwide. Capabilities in branding, strategising, consuming, innovating and managing cannot be reduced to prescriptive or normative models that apply to every setting (Ardley & Quinn, 2014; Svensson, 2007). Instead, each job consists of multiple and often unique physical and mental activities, tools and procedures that are influenced by both societal and specific contexts wherever it is performed (Reckwitz, 2002). However, this research

proposes that the underlying make-up of these knowledge and relational-based activities may be distilled into five marketing specialist knowledge domains. By reviewing marketing and management literature, this research proposes that marketing specialist knowledge is made up of the following: marketing expertise, organisation familiarity, market intelligence, leadership, and life experience. The following sections clarify and justify the selection of each of these knowledge domains.

2.2.2.1 Marketing expertise

Marketing expertise is a distinct knowledge domain that encapsulates certain qualities necessary to be considered a marketing specialist. An expert is someone responsible for the development, implementation, and/ or control of solutions, strategies, and/policies, and who has privileged access to information about groups of persons or decision processes (Meuser & Nagel, 2009). Meuser and Nagel argue there are three knowledge dimensions of an expert: First, technical knowledge; where they have specific, detailed knowledge of operations, laws, or whatever may be influential in their field. Second, process knowledge; where they have information on routines, specific interactions, and processes as they are directly involved. Third, explanatory knowledge; where the expert can provide subjective interpretations of the relevance, rules, and beliefs in their field, as well as ideas, ideologies, and their inconsistencies. The following section discusses how marketing practitioners operate these three forms of knowledge.

To restate, technical knowledge, the first knowledge dimension of an expert is where they have specific, detailed knowledge of operations, laws, or whatever may be influential in their field. Several studies have been conducted to identify essential skills and capabilities marketing practitioners require to be effective within a firm, i.e., to improve marketing management and firm performance (Gray et al., 2007; Melaia et al., 2008; Walker et al., 2009). The knowledge areas of marketing practitioners that were identified to influence marketing management and firm performance positively include strategic marketing, marketing communications, product and brand management, and consumer behaviour (Gray et al., 2007). Also, knowledge regarding innovation and new product development, business to business marketing, pricing, services marketing, market research and analysis, personal selling and sales management, and direct and digital marketing (Gray et al., 2007). Further, societal and ethical issues in marketing, international and export marketing, marketing logistics and distribution, as well as retail marketing and management are subjects marketing practitioners require proficiency in (Gray et al., 2007). While these topics, while neither exhausted nor generalisable (Gray et al., 2007), provide the marketing practitioner broad knowledge of the marketing discipline, further forms of knowledge are required by the expert (Meuser & Nagel, 2009).

The second form of knowledge, process knowledge, describes how experts have information on routines, specific interactions, and processes as they are directly involved. Studies have described the progressive skills-base, and experience marketers need to advance into higher

managerial or marketing specialist roles (Gray et al., 2007). For instance, findings from surveys of marketing managers, marketing academics, senior marketing students, and employers provide lists of essential skills for marketing practitioners to progress further into managerial roles. These process-based knowledge topics include the ability and willingness to learn about product-markets, to solve marketing problems, to communicate with internal and external stakeholders, and to work within teams (Gray et al., 2007; Walker et al., 2009). While problem-solving, team, and analytical skills, as well as specialist marketing skills, are crucial for marketing practitioners, employers are after marketers who have a knowledge base beyond the basic marketing concepts (Walker et al., 2009). Findings suggest that, as well as marketing competencies, employers require marketers to know the industry and firm (Walker et al., 2009), which are discussed further in the organisation familiarity knowledge domain below.

The third dimension, explanatory knowledge describes where the expert can provide subjective interpretations of the relevance, rules, and beliefs in their field, as well as ideas, ideologies, and their inconsistencies. The marketing specialists' use of marketing jargon, terms, and systems such as SWOT, competitive analysis, and the Boston matrix to make their ideas or position legitimate are some examples (Ardley & Quinn, 2014; Jaakkola, 2011; Svensson, 2007). In one study of an agency meeting with their client, marketers demonstrated expertise in presenting marketing principles, tools, and concepts in ways that a variety of audiences would understand (Svensson, 2007). Here, their ability to explain how advertising techniques worked reassured clients they were capable of controlling consumers' minds and behaviours, making responses to a marketing campaign calculable and foreseeable (Svensson, 2007). Hence, the ability to express, explain, and persuade non-marketing personnel of marketing's stratagems and efficacy is considered a crucial dimension of marketing expertise.

Other practitioner-level marketing studies have implicitly discussed marketing expertise in particular roles and contexts. For example, marketing specialists needed expertise when doing presentations (Moeran, 2005), making marketing decisions (Lien, 1995, 1997), and being creative (Kilgour & Koslow, 2009; Taillard & Kastanakis, 2015). While research has shown that expert or specialist knowledge may limit a person's ability to generate creative solutions (Adelson, 1984), the predominant view, however, is that expertise is needed (Kilgour & Koslow, 2009; Taillard & Kastanakis, 2015). Finally, when procedural or operational options are discussed among marketing specialists, no explanation is entered into as they implicitly understand the legitimacy of given options (von Koskull & Fougère, 2011). Appropriating Meuser and Nagel's (2009) definition of an expert, marketing expertise is defined here as knowledge regarding the development, implementation, and/ or control of marketing solutions, strategies, and policies.

2.2.2.2 Organisation familiarity

As mentioned, employers interviewed for research regarding “competent marketing professionals” emphasised the marketing practitioners’ need for general business, job, or industry-specific skills (Walker et al., 2009, p. 253). Hence, organisation familiarity, as it is called here, appears to be a vital knowledge domain for the marketing specialist. Organisation familiarity consists of the marketing specialists’ knowledge of the firm’s personnel, branding, structure, culture, stakeholders, resources, capabilities, strategic intent, identity, products, offerings, and commercial setting. In management, international or industry standards, as well as routines, operating procedures, cultures, and the political dimension combine to inform and shape the manager’s work within the firm (Whittington, 2006). Likewise, marketing specialists are required to have a familiarity with similar systems within their organisational context (Walker et al., 2009). Organisation familiarity also pertains to the marketing specialist understanding and adhering to the marketing doctrine of their firm (Challagalla et al., 2014). Here, organisation familiarity requires marketers to learn, understand, process, integrate, and diffuse knowledge of their firm, its industry, and its stakeholders as they conduct their work. Therefore, by contributing to their firm’s market orientation (cf. Leeflang et al., 2014), a marketing manager’s organisation familiarity helps facilitate their influence within or upon their firm.

Organisation familiarity distinguishes the marketing manager’s knowledge of a firm from that of a third-party marketing consultant. This distinction considers the marketing manager’s knowledge of the firm’s culture, personnel, industry’s standards, governing principles, and strategic intent, compared to that of the marketing consultant. Apart from providing external marketing contractors with a grounding in the resources, objectives, and branding of their firm, organisation familiarity may assist marketing specialists in influencing their firm's market orientation (Göetz et al., 2013; Verhoef et al., 2011). Organisation familiarity also entails a marketing manager’s reputation within their firm, where non-marketing personnel might acknowledge their marketing manager’s expertise and past performances. For instance, “top management respect” is a factor of influence marketing managers leverage influence from, demonstrating an understanding of how one is perceived by others when considering one’s decision influence (Verhoef & Leeflang, 2009, p. 15). Other forms of organisation familiarity may consider political or relational factors that might facilitate or impinge the influence a marketing specialist may have.

As shown, organisation familiarity acknowledges both the particularities of the organisational environment the marketing specialist finds themselves in and their attachment to their organisation. As outlined above, organisation familiarity is a vital and distinct knowledge domain of the marketing specialist, particularly the marketing manager. Whittington (2006) also claims that organisational influences play a significant role due to the accountability imposed on

them by the firm. Therefore, knowledge of industry standards, their firm's resources, culture and branding, and access to intra-organisational knowledge and respect is likely to differentiate the firm's marketing manager from third-party marketing consultants.

2.2.2.3 Market intelligence

Because firms do not live in a vacuum, marketing specialists require market intelligence, or, put another way “contextual knowledge” (Ottesen & Kjell, 2004, p. 522). In other words, up-to-date market intelligence is a key component and antecedent of firm performance, and marketing specialists are typically the researcher and holder of this knowledge (Hattula, Schmitz, Schmidt, & Reinecke, 2015; Kjellberg et al., 2012; Theodosiou & Katsikea, 2013). Market intelligence is defined here as formal and informal insights into current and anticipated market needs and movements, including competitor activities (Hattula et al., 2015; Theodosiou & Katsikea, 2013). Here, the timely and accurate knowledge of competitors and the strategies they deploy as well as the developing trends and size of the market are crucial to a firm's competitive performance (Ottesen & Kjell, 2004).

Consequently, marketing departments' influence, compared with other functions in the firm, is enhanced due partly to their focus on and experience of the marketplace (Homburg et al., 1999; Verhoef & Leeflang, 2009). When discussing market-driven firms, Day (1994) identifies market-sensing, customer linking, channel bonding, and technology monitoring as key capabilities of marketing practitioners. To elaborate, market-sensing goes beyond analyses based on traditional market research and database management (Lusch & Webster, 2010), it is the ability to anticipate market trends and events more accurately than competitors (Day, 1994).

The accumulation, analysing, and dissemination of information regarding customer's needs and wants is a distinctly marketing activity (Day, 1994; Morgan, 2012). Firms often obtain market intelligence from market research projects done either in-house or by third-party supplier and are often obtained for use in a specific decision (Deshpande & Zaltman, 1982; Maltz & Kohli, 1996). However, competing firms often have access to similar market intelligence; therefore scholars suggest its likely competitive value to firms consists in its use rather than its accessibility (Maltz & Kohli, 1996). An understanding of competitors is particularly salient around marketing activities such as planning, pricing, promotion, and product development (Morgan, 2012). As customer-centricity and production capacity continues to increase, firms also strive to increase their understanding of their competition (Morgan, 2012). Subsequently, market turbulence may be attributed to a continuous result of marketing stratagem applied by firms to counter their competitors (Kjellberg et al., 2012).

The dissemination of market intelligence is a crucial component of a marketer's involvement in a firm's market orientation. Specifically, its effective dissemination is linked to increasing the efficiency and effectiveness of the decision-making processes between departments (Hattula et

al., 2015), enhancing financial performance (Jaworski & Kohli, 1993), and alignment with the voice of the customer (Luo, Slotegraaf, & Pan, 2006). Hence, market intelligence is a critical and valuable knowledge domain of the marketing specialist.

2.2.2.4 Leadership

Leadership is the fourth knowledge domain identified as being a vital attribute for marketing specialists. Leadership has been described as notoriously difficult to define, with leadership academics perplexed at the complexity required to describe leadership (Hernandez, Eberly, Avolio, & Johnson, 2011). Therefore, this research adopts a commonly used definition for leadership, being “a process whereby an individual influences a group of individuals to achieve a common goal” (Northouse, 2012, p. 5). As discussed, the study of marketing *department* influence within a firm and over the marketplace has been widely studied and reported on (Merlo, 2011; Verhoef et al., 2011), with a variety of constructs and perspectives of leadership activity offered by the literature. However, this research examines the influence of the marketing specialist, the *individual* identified in the above definition of leadership. Also, as marketing specialists often occupy middle management positions, the definition of leadership above allows for any employee to demonstrate leadership in a specific circumstance, albeit temporarily. For instance, the ability to construct and articulate compelling stories or views has been described as a situated leadership activity (Maitlis & Lawrence, 2007; Rouleau & Balogun, 2011). Therefore, marketing specialists, whether in managerial or consultative roles, are likely to lead others as they plan, develop, implement, or appraise their marketing projects.

Although leadership studies are a relatively new social discipline, significant attention has been focused on a variety of leadership topics (Carroll et al., 2008). These topics include leadership qualities (e.g., confidence, optimism, charisma), behaviours (e.g., inspiring others, role modelling), intelligences (e.g., cognitive, emotional, spiritual), and their orientation (task or people). Furthermore, leadership topics include the nature of their work (e.g., interpersonal, adaptive or strategic), typologies (e.g., transformational, servant, authentic), as well as lists of leadership styles, skills, tools, and competencies (Carroll et al., 2008). Studies regarding the emotional, social, cognitive and personality traits in leaders of sales and marketing department contexts have also been conducted which link performance with specific competencies within practitioners (e.g., Boyatzis, Good, & Massa, 2012).

However, along with marketing research, some leadership studies have been criticised for providing general and detached views of leadership. For instance, leadership topics may articulate the abstract ideas (i.e., having vision and commitment, being an inspiration) but neglect expressing the complexity of interaction and inter-relations whilst pursuing these ideals (Carroll et al., 2008). Whereas some leadership studies investigate how leadership styles stimulate the thoughts and behaviours of followers (e.g., Kazmi, Naarananoja, & Kytola, 2015). As marketing specialists lead others within a marketing project context (Morgan, 2012), this

research has identified leadership as one of the essential knowledge domains of the marketing specialist.

Commentary regarding value creation suggests configuring resources such as people, knowledge, and technology, where their competencies are aligned for a beneficial outcome, forms the basis of economic exchange (Vargo, Maglio, & Akaka, 2008). A marketing project is often the product of co-creation between the marketing specialist, personnel, stakeholders, a firm's resources, and customers (Ramaswamy, 2009). Within the production process, leadership skills are vital to both the initiative and steering of a new project (Ramaswamy, 2009). Marketing specialists either display or are expected to demonstrate leadership qualities in a variety of contexts (e.g., Merlo, 2011; Moorman & Rust, 1999; Verhoef et al., 2011). For instance, part of their role as marketing specialists is to implement marketing strategy (Bonoma, 1985), motivate, facilitate, monitor and nurture networks (Bonoma, 1985; Gray et al., 2007; Merlo & Auh, 2009; Moorman & Rust, 1999), and influence a firm's market orientation (Verhoef et al., 2011).

However, similar to leadership studies, marketing literature would benefit from more concrete, ground-level, and engaged studies focusing on the 'doings' of marketing specialist leadership. In other words, research is needed that takes on board a "withness" rather than an "aboutness" approach (Shotter, 2005, p. 585; Svensson, 2007) to fill in gaps in our understanding how marketing specialists are influential. Such research would not only complement the more general and abstract marketing influence literature currently available, but provide a practical, textured, and nuanced discourse between management academia and practitioners.

As mentioned, leadership considers the marketing specialist's involvement in the firm's market orientation. In marketing literature, the role of marketing practitioners as boundary spanners, linking customers and critical firm elements describes the interaction marketers have which are crucial to firm performance (Day, 1994; Maltz & Kohli, 2000; Moorman & Rust, 1999). In essence, whether these actors are senior, collegial, subordinate, or external, the marketing specialists' interaction with them will likely involve a leadership role in some capacity (Rouleau & Balogun, 2011). Therefore, examining and understanding the leadership knowledge domain of the marketing specialist is warranted.

2.2.2.5 Life experience

The life experiences of a marketing specialist may play a significant role in their day-to-day work-life, their marketing projects, and their firm's performance. Life experience helps with ways of understanding how things and people are linked, it engages one emotionally and helps provide a collective understanding of others and oneself (Reckwitz, 2002). Hence, life experience is defined here as being composed of one's values, non-marketing competencies, personal skills, and talents which help with ways of understanding how things and people are

linked. Aspects of one's life experiences include their past and current cultural, academic, sporting, leisure, religious, and social interests and achievements. Research strongly suggests that the memory bank of life experiences and personal tastes may be integral in the way individual marketers shape their projects (Ibarra, 1999). For instance, a marketing specialist's life experience may go some way in helping determine whether aspects or the entirety of their marketing activity will resonate with the target audience. Thereby, the firm's performance, based on their target market's response to the marketing project may be directly affected by a marketing manager's life experiences.

Research shows that life experiences synthesise with an actor's knowledge to generate new ideas (Andrews & Smith, 1996), with the presence of distant or divergent thoughts as integral to the originality of ideas (Kilgour & Koslow, 2009). As well as the originality and appropriacy of ideas, empirical study on the marketing norms of marketing specialists found that life experience plays a significant role in day-to-day marketing decisions (Rallapalli, Vitell Jr, & Szeinbach, 2000). Here, pricing, distribution, information, and contract norms, as well as honesty and integrity, were significantly affected by the marketer's values (Rallapalli et al., 2000). Moreover, personal values, which construct part the marketing specialists' life experiences, also consist of excitement, warm relationships with others, fun and enjoyment of life, and a sense of accomplishment (Rallapalli et al., 2000). Understanding and negotiating human attributes is likely to assist marketing specialists in developing relevant and resonating marketing messages for their marketing projects, as well as assist in collaborating with others. Therefore, life experience is the fifth and an essential proposed knowledge domain of marketing specialists.

2.2.2.6 Summary of marketing specialist knowledge domains

Scholars surmise that the competitive advantage a firm has is partly derived from the acquisition, development, and management of marketing knowledge (Madhavaram et al., 2014). Moreover, the influence of a strong marketing *department* has been quantifiably justified (Homburg et al., 2014). However, the marketing literature lacks insights into marketing knowledge and its influence at a *practitioner* level. Based on the above literature, marketing specialist knowledge consists of a bundle of knowledge domains, namely: marketing expertise, organisation familiarity, market intelligence, leadership, and life experience. As discussed, marketing specialists draw from these proposed knowledge domains to produce or add to the production of, value for the firm.

2.2.3 Marketing specialist thinking processes

A discussion on marketing specialists knowledge is incomplete without a discussion regarding the *processing* of their knowledge, in other words, how they think (Grant, 1991). The thinking process of individuals is a topic that has also engaged philosophical, scientific, and educational

scholars (Evans, 2003; G. Smith, 2003). There are few studies on critical thinking in business or management disciplines (G. Smith, 2003), let alone within the marketing context, although exceptions exist (e.g., Klebba & Hamilton, 2007). A review of rational and critical thinking would represent the marketing specialists sufficiently as these studies encompass relevant thinking processes such as creative, strategic, reflective, decision-making, and problem-solving (Berzins & Sofo, 2008; Thurmond, 2001). Moreover, skills related to rational or critical thinking are not considered unique to a particular discipline (Berzins & Sofo, 2008; Ennis, 1989).

2.2.3.1 Nature of rational thinking

Rational thinking has been described as a dual-process, where each process is rooted in a distinct cognitive mechanism (Evans, 2011). In dual-process theories, classes of thinking are popularly generalised as either heuristic (Type-1) or analytic (Type-2) processes (Evans, 2011; Heijltjes et al., 2014; Stanovich et al., 2011). Briefly, Type-1 thinking is typically fast and intuitive, while Type-2 is typically slow and deliberative (Evans, 2011; Kahneman, 2011). The definition of each process as currently applied in the cognitive psychology of reasoning is:

Type 1: fast, high capacity, independent of working memory and cognitive ability

Type 2: slow, low capacity, heavily dependent on working memory and related to individual differences in cognitive ability

(Evans, 2011, p. 87).

Dual-process theories have received a large share of attention (Evans, 2003, 2008; Heijltjes et al., 2014; Kahneman, 2011; Stanovich, 2009), starting when scholars were trying to account for differences between intuitive cognitive biases and effortful, rational thinking (Evans, 2011). As mentioned, Type 1 or heuristic processing is a rapid, automatic form of thinking, involving little effort from reflective processes or high-level control systems. Moreover, Type-1 thinking is dependent on experience and is often utilised in routine situations due to its efficiency in decision-making (Heijltjes et al., 2014; Stanovich et al., 2011). As Stanovich et al., (2011, p. 104) explains, Type 1 processing is “is a grab-bag—encompassing both innately specified processing modules/procedures and experiential associations that have been learned to automaticity”. Type-1 processing encompass rules, decision-making principles, implicit learning and conditioning, and biases that are heuristically applied (Stanovich, 2011).

In contrast, Type 2 or analytic processing is typically slower and sequential and is distinguished further into reflective and algorithmic operations (Heijltjes et al., 2014; Stanovich, 2009). The mind’s reflective operations work at an intentional level and are based upon the actor’s dispositions such as their beliefs, cognitive style, epistemic values, future considerations, and goals (Heijltjes et al., 2014). For instance, certain dispositions such as being actively open-minded, anticipating the future, and the tendency to engage in and enjoy thinking are typically

required for reflective thinking (Heijltjes et al., 2014; Stanovich et al., 2011). Algorithmic thinking performs both analytical and inhibitory processes providing processes to make correct decisions or take appropriate actions (Heijltjes et al., 2014). For instance, in Type-2 processing reflective processes create a disposition where thinking is relatively unconstrained and anticipatory. However, algorithmic processes, or being mindful of an external accountability to goals, constrains reflective thinking to consider outcomes that provide optimal performance (Stanovich et al., 2011). In order for Type-2 processing to take place, scholars suggest it must override Type-1 or heuristic thinking using two related capabilities. Here, Type-2 processing must first interrupt the Type-1 processing and secondly, initiates hypothetical reasoning and cognitive simulation (Evans, 2007, 2010). Once Type-1 thinking has been halted, the process of hypothetical reasoning creates a temporary, simulated model of the world in which actions or alternative causes are tested (Stanovich et al., 2011).

Following on, critical thinking has been described as a subset of rational thinking described above. Critical thinking is a process of arriving at a decision and involves reflecting; a feedback loop to correct one's knowledge, as well as understanding how one's knowledge is justified (Berzins & Sofo, 2008). This process gives one control over their beliefs, as well as what and why they think something. Furthermore, critical thinking is holistic, involving more than higher-order reasoning, the examination of ideas, statements, beliefs and actions of self and others. Critical thinking also "includes feelings, attitudes, values, past experiences, beliefs and knowledge and applying these to a specific situation" (Berzins & Sofo, 2008, p. 262).

Therefore, critical thinking involves both the skill and disposition of the thinker (Facione, 1990; Heijltjes et al., 2014; Kuhn, 1999) and is the "reasonable reflective thinking that is focused on deciding what to believe or do" (Ennis, 1987, p. 10). Correspondingly, marketing decision-making is inextricably linked to critical thinking (Klebba & Hamilton, 2007), and is a critical consideration in understanding the role of marketing specialist knowledge and influence.

However, despite complex and rapidly changing business environments, and the pivotal nature of competency in a competitive marketplace, there is very little text for management students regarding critical thinking (Klebba & Hamilton, 2007; G. Smith, 2003). Further research into the constitution, process, and influence of marketing specialist knowledge, thinking, and its influence may illuminate its mechanisms, effectiveness, and value. Therefore, as the managerial and strategic responsibilities of the marketing specialist increase, it is likely the role that critical thinking plays must also increase, and accordingly be understood (Klebba & Hamilton, 2007).

2.2.4 Summary of marketing specialist knowledge and its influence

Marketing specialist knowledge is an under-researched topic in marketing influence studies (Madhavaram et al., 2014). While the topic of marketing specialist knowledge, its processing, and its influence has scarcely been investigated, its presence and power are pervasive in the current marketing and management literature. Current marketing literature has indirect

references (Engelen, 2011; Göetz et al., 2013) or conceptual contributions (Lusch & Webster, 2010) regarding marketing specialist knowledge as an aspect of the marketing department's influence. However, there is little attention paid to marketing specialist knowledge at practitioner-level and its influence on the firm and marketplace. Investigating marketing specialist knowledge and its influence requires analyses on a complex mosaic of understandings marketing specialists lean on from multiple resources. An investigation would also include the cyclical process in these interrelations, and how these understandings go on to shape ideas that are influential. By influential, the marketing specialist's ideas must be considered appropriate, meaningful, and acceptable to multiple stakeholders before they go on to shape decisions at the marketing project, firm, and marketplace (Rouleau & Balogun, 2011; Taillard & Kastanakis, 2015).

2.3 Marketing practitioner studies

As mentioned, while the above studies highlight the determinants of the marketing department's influence on firm performance, their findings were limited. Specifically, findings from research into marketing department influence were derived from approaches that, despite applying scientific rationality, essentially generated theory through detachment from practice (Sandberg & Tsoukas, 2011). Hence, while these studies identify attributes inherent in the influence of marketing departments, they do not demonstrate how or why practitioners use these attributes during their work (Sandberg & Targama, 2007). Therefore, despite identifying and discussing the determinants of the marketing department's influence, studies to date have failed to adequately describe what marketing practitioners do (Ardley & Quinn, 2014; Dibb et al., 2014; Leeflang, 2017; Skålén & Hackley, 2011). For instance, Moorman and Rust (1999) conclude that the role of the marketing department to connect their firm's customers with critical elements within their firm, including their product and service delivery. Details, however, on how these connections are made, maintained, or renewed are missing. Verhoef and Leeflang's (2009) conclusions regarding the marketing department's areas of influence, i.e., their accountability and innovativeness, were also of a general nature. Thus, the reader is left wondering how marketing practitioners connected their firms with their customers, or how they acted with accountability and innovativeness.

Hence, marketing academics have been calling for further studies on the roles and activities of marketing practitioners. For example, Jaworski (2011, p. 212) points out that we have only a "superficial, outdated knowledge of marketing roles and positions within firms". Also, Skålén and Hackley (2011) raised concerns over "the relative lack of 'bottom-up' empirical research into how marketing is actually done in organizations" (p. 189). Further, Dibb et al., (2014) indicate that a lack of inductive research is a concern for those who would like concrete descriptions of what marketers do (Skålén & Hackley, 2011; Svensson, 2007; Webster, 2002).

Although research shows marketing departments add value to firms, scholars claim that we are still bereft of intelligence relating to the everyday work and social interaction of marketing practitioners (Dibb et al., 2014; Jaworski, 2011). For the purposes of this research, the marketing department is made up of marketing practitioners or individuals of various marketing capabilities and expertise, which may include non-marketing subject-matter experts. Further, the marketing specialist is distinguished in this study as having a minimum of two years' experience, having more marketing knowledge and project experience than those less senior (Malshe, 2010)

Marketing has lagged behind other functions in terms of classifying the specific roles that its practitioners carry out, (Skålén & Hackley, 2011; Svensson, 2007). Existing studies on the marketing role tend not to focus on practitioners, but rather on departments or broad and generalised practices (Dibb et al., 2014; Jaworski, 2011; Kjellberg & Helgesson, 2006). While research has examined some marketing roles (Moorman & Rust, 1999; Verhoef & Leeflang, 2009), skills (Gray et al., 2007), and capabilities (Morgan, 2012), they tend to focus on functional or cultural perspectives and/ or widespread marketing practices within the firm. However, these studies have provided 'little insight into the detailed activities undertaken by practitioners which collectively comprise marketing practice' (Dibb et al., 2014). In response, numbers of marketing practitioner studies that provide a detailed analysis of what marketers do in specific contexts have been increasing. For example, Brownlie and Hower (2011) have argued that firms might benefit from an approach that asks, how do marketers do what they do? How can we sensitise ourselves to the doings of marketers? How do marketers do marketing?

Marketing practitioner-level studies empirically describe the activities of marketers in the contexts of events within firms. Their advantage is that practitioner-level studies describe far more complexity, conflict, abstract thinking, and social skills than the neat cognitive structures of marketing activities currently dominating the marketing influence literature (Ardley & Quinn, 2014). These studies go some way in describing what marketing practitioners do.

To begin, Moeran's (2005) research describes how marketing specialists from an advertising agency prepared their campaign ideas in readiness to competitively pitch to a Japanese multinational company. A critical factor in winning the account was the agency's performance in demonstrating the Japanese multinational's credibility in the marketplace, being Germany and the US. Here, the marketing specialists had to navigate with their Japanese client's interpretation of the Western consumer and the Western consumer's interpretations of authentic Japan. Moreover, as the world of advertising is less about the actual, the marketing specialists are also constructing authenticity around idealised human states and experiences in order to produce credible advertising messages. Therefore, the marketing specialists would consider among themselves keywords such as "authenticity, creativity, quality, novelty, originality and tradition" when developing their pitch ideas (Moeran, 2005, p. 904). From an impression

management perspective, as well as developing a compelling marketing message, this regime aimed to demonstrate a credible and sincere alignment with the corporation among other competitive agencies (Moeran, 2005).

Moreover, soliciting prospective clients also allowed the marketing specialists to gain familiarity with the client's business, from its branding mindsets to its managerial power structure (Moeran, 2005). The marketing specialists also had to develop language and visual cues within their advertising ideas that would be cogent for both the German and US markets, demonstrating a mastery of both target markets. However, the culmination of these factors presents the marketing specialists the complex problem of how to pitch their campaign ideas. By transforming market analysis into creative ideas, the marketing specialists had to balance the objective realities of the marketplace with the tastes and preferences of their potential account's decision-makers. Hence, discussion of the backstage strategy, the front stage performance, and the post-mortem analysis of the marketing specialists' presentation detailed their social and professional nuances of producing advertisements (Moeran, 2005).

In a similar vein, Svensson's (2007) discourse-analytical commentary of a meeting between an advertising agency and their client is another example of an in-depth investigation into the practices of marketing practitioners. Svensson's (2007, p. 271) study sought to "problematize and de-reify the phenomenon of marketing work" by examining its social and discursive character. Issue is taken with an approach that defines marketing work as the application of marketing principles, theories, and models to various contexts marketing specialists apply themselves within. By setting a social-phenomenological lens upon the marketing practitioner, Svensson (2007) instead finds that the marketing practitioners actively navigate various discursive and sociological terrains to affect their work. Consequently, the study represents how the work of marketing is more complex and nuanced than its dominant representation of applying marketing textbook principles in a linear or prescribed fashion (cf. Moorman & Rust, 1999; Verhoef & Leeflang, 2009).

Also, Ardley and Quinn (2014) investigate how individual marketers use a range of literary devices to constitute marketing management. Similar to Svensson (2007), the authors challenge the narrow, linear, and mechanical conceptualisations of marketing work based on the application of current marketing theory, principles, and models. The first discourse analysis category discussed, legitimacy, describes how marketing managers employ the language to marketing as leverage toward change (Ardley & Quinn, 2014). By using sound marketing theory and language, the marketing manager legitimises how important specific business issues by couching them in rational and technical language. Their second finding, categorised as tacit discourse, describes how marketing managers continuously refer to the tacit when discussing marketing actions (Ardley & Quinn, 2014). Using tacit discourse demonstrates a mastery of the marketing practices, beyond the technical and straightforward processes described and

prescribed in textbooks. In other words, the marketing managers are using language which captures the emotional, intuitive, instinctive, and experiential constituents required for their marketing projects (Ardley & Quinn, 2014). Third, the discourse of conflict categorises how the marketing managers dealt with issues of interpretation, definition, and issues around change management and unity. For example, Ardley and Quinn (2014) cite instances on different personnel within firms having a different interpretation of what marketing is, or the resistance to change expressed by those affected by marketing initiatives. As shown, a discourse analysis of participating marketing managers illuminates the performative marketing role beyond that typically conceptualised in literature.

Although these marketing practitioner studies provide micro-level accounts, they represent increasing calls for studies into individualised, problematised accounts of marketing work (Skalen, Fougere, & Fellesson, 2007). By connecting with marketing practitioners, the above researchers have produced a nuanced account of marketing work, evidencing pluralistic ways in which marketing activities were constituted and practised. Subsequently, the authors' highlight aspects of human and social characteristics of marketing work, which contrasts starkly with universal representations usually evidenced in the marketing literature. Studies at the practitioner level answer scholarly calls to understand what marketers do by problematising or de-reifying the topic and eschewing simplistic or departmental categorisations (Ardley & Quinn, 2014; Skålén & Hackley, 2011; Svensson, 2007). Moreover, by focussing upon the marketing specialist with a lens that embraces a more nuanced and complex approach would increase our understanding of their knowledge and influence.

2.4 Practice Theory

As discussed, previous survey-based studies of marketing departments have provided insights, typologies, conditions, and competencies which show how, where, why marketing departments positively affect business performance. However, in-depth inquiries into the roles of marketing practitioners are needed (Jaworski, 2011), otherwise, as Grönroos (2006) asserts, a broad marketing role 'becomes an empty phrase without any content.' Also, there is a need to ascertain what marketing practitioners actually do and how they provide value to the firm (Dibb, Simoes, & Wensley, 2013). Also, a report from Deloitte (2008, p. 3) asserts that there is a "lack of a common understanding of the role of marketing, and what it delivers to and within an organisation." Further, one of the Marketing Science Institute's (2018, p. 15) 2018-2020 research priorities is to "how can marketing enhance its voice in the C-suite". Studies regarding the roles, capabilities, skills, and influence of marketers have frequently provided only a *representative* idiom (Araujo et al., 2008), where the author has striven to provide an accurate and comprehensive portrayal. However, research which provides a *performative* idiom (Araujo

et al., 2008), which highlights the specific practices that unfold as the marketer performs their role, is needed.

Practice Theory, which has been developing in strategy literature for over a decade, provides a cogent framework for this research. While nascent in marketing literature, the practice-turn, as it is also known, is pertinent here due to its focus on the practitioners' knowledge and day-to-day activities (Jaakkola, 2011; Reckwitz, 2002; Whittington, 2006). Altogether, the practice approach seeks to describe the shared, routinised patterns of knowing, understanding, and actions of practitioners (Reckwitz, 2002). Practices, according to Chia and Holt (2006), are coping skills that lay in the background of the practitioner's mind and are unconsciously drawn upon to navigate everyday work/life. Hence, practices and knowledge are integral although distinct (Bain & Mueller, 2016).

Practice Theory considers its topic at a micro-level by reporting on the perspectives and situated doings of individual and cases. However, it also considers the macro phenomena, the socially defined practices that marketers engage. This dual approach solves contextual problems found in research whose focus is solely on micro-actions (Jarzabkowski, 2005; Jarzabkowski, Balogun, & Seidl, 2007). This study also investigates how specialist marketing knowledge radiates out to influence and impact their environment (Jarzabkowski & Spee, 2009; Seidl & Whittington, 2014).

To clarify, the use of Practice Theory in a marketing specialist context differs from literature examining Contemporary Marketing Practices (CMP) (Brodie, Coviello, & Winklhofer, 2008). Although Practice Theory and CMP research both seek to close the gap between theory and practice (Brodie et al., 2008), they operate at different levels. Overall, CMP is concerned with how marketing practices assist firms in interacting with their market, technology, and other organisations (Brodie et al., 2008). Specifically, CMP examines the dichotomy between classical transactional approaches such as the 4Ps of marketing and the relational approaches firms adopt in their marketing activities (Brodie et al., 2008). In contrast to examining marketing practices in a broad business sense, Practice Theory investigates what guides the actions of practitioners, i.e., their practices, as well as their activities, i.e., their praxes (Jarzabkowski & Spee, 2009).

As marketing is context dependent (Sheth & Sisodia, 1999), Practice Theory seeks to provide both a macro perspective, i.e., how marketing specialists knowledge guided their activity, and micro perspective, i.e., what they did (Whittington, 2006). Following on, by investigating how knowledge and its processing guides the marketing specialist's decision-making, it is anticipated that Practice Theory will also provide insights into how and why these decisions were influential.

Practice Theory challenges common ways of examining human life and sociality (Reckwitz, 2002; Schatzki, Knorr-Cetina, & von Savigny, 2001), and has grown more popular in managerial studies in recent times. As discussed, this interest has been sparked by calls to investigate the work life or “life-world” of managers (Brownlie, Hewer, & Ferguson, 2007; Jaworski, 2011). Reckwitz (2002, p. 246), when developing a theory of social practices, was informed by the work of diverse social theorists. These theorists were connected by an interest in the “everyday” and “life-world” and were influenced by the interpretive or cultural approach in social theory. Bourdieu (1990), de Certeau (1984), and Giddens (1984) use the term “practices” in various ways, yet they are alike in their emphasis on routines, shared habits, procedures, and skills (Shove & Pantzar, 2005). Schatzki et al., (2001) adds to these views by arguing practices presume to include images and objects. Reckwitz (2002, p. 253) also shares this thinking: “Carrying out a practice very often means using particular things in a certain way”, where practices involve the mixture of material, meanings, and forms of competence (Shove & Pantzar, 2005). In management studies, Practice Theory “aims at the demystification, deepening and appreciation of the ‘nitty-gritty details’ of routine and practice” (Carroll et al., 2008, p. 364).

2.4.1 Uses of Practice Theory

Practice Theory provides a heuristic device, a ‘sensitising’ framework for empirical work in social sciences, the purpose of which is twofold. First, it provides a way of seeing and analysing phenomena and second, it provides a way of seeing ourselves as people within society, thus enriching our self-understanding (Reckwitz, 2002, p. 257). Practice Theory, as one cultural theory, does not just analyse mental phenomena, as cultural mentalism does; discourse and language as cultural textualism does; or human interaction, as intersubjectivism does. Practice Theory examines the interconnectedness of knowing and understanding (mental routines) and its impact on doing (bodily routines) via a human agent and their use of things. Hence its focus on the micro, “the situated doings of individual human beings” and the macro, “different socially defined practices that the individuals are drawing upon in these doings” (Jarzabkowski et al., 2007, p. 2). Practice Theory enables researchers to make empirical accounts of the social world. Along these lines, although nascent in marketing research, Practice Theory has already been used in several fields such as science studies, gender studies, and organisational studies (Reckwitz, 2002).

Within organisational studies, Practice Theory has received increasing use within the last decade as interest in the everyday doings of actors in firms has grown (Brownlie & Hewer, 2011; Hällgren & Lindahl, 2012). Reasons for this upsurge include Practice Theory's design in offering focussed, more productive, and more penetrative insights of specific managerial activities (Dibb et al., 2014). For instance, Practice Theory is designed to capture and link together the forces of both the macro or societal level, as well as at the micro and mundane level

(Brownlie & Hewer, 2011; Hällgren & Lindahl, 2012; Whittington, 2006). The central research interest of Practice Theory is to focus on what actors are, what they do, as well as why and how these are consequential in socially accomplishing their particular activity (Jarzabkowski et al., 2007). Therefore, Practice Theory provides a suitable approach to investigating marketing specialist knowledge and its influence.

Practice Theory has engendered research investigating specific managerial activities for readers who otherwise have no 'close-ups' of action as it is played out in the real world of management (Brownlie & Hewer, 2011). There has also been a growing number of practice articles in various managerial fields such as strategic management (e.g., Whittington, 2006), accounting (Ahrens & Chapman, 2007), HRM (e.g., Birdi et al., 2008; Martín-Alcázar et al., 2008; Vickers & Fox, 2010), project management (e.g., Hällgren & Lindahl, 2012), technology in organisations (e.g., Orlikowski, 2002), operations (e.g., Shah & Ward, 2003), leadership (e.g., Carroll et al., 2008), and management studies (e.g., Handley, Sturdy, Fincham, & Clark, 2006; Roberts, 2006). As Skålén and Hackley (2011) assert, a worthy enterprise for Practice Theory is to 'illuminate and explicate the practices ordering action in distinct domains of the social, such as marketing.'

2.4.2 Practices, praxis, and practitioners

The approach Practice Theory has toward investigating human thought, and subsequent activity provides various advantages to the researcher. Practice Theory's ontology, epistemology, and methodologies offers "different and multiple units of analysis, considerably broader definitional scope, a new vocabulary and a re-theorization of both agency and action" (Carroll et al., 2008, p. 366). To distinguish Practice Theory, Reckwitz (2002) introduces two themes: *practices* and *practice*, where *practices* denote the concept of shared knowledge (which actors carry), and *practice* refers to human activity (which actors carry out). As Whittington (2006) points out, the problem with Reckwitz's vocabulary is the similarity in the terms 'practices' and 'practice', which during a long treatise may confuse the reader. In order to provide a clear and consistent vocabulary for these concepts in Practice Theory, Whittington (2006) uses three terms: practice, praxis, and practitioners. Whittington (2006) retains the term 'practices' to denote shared knowledge - but uses 'praxis', rather than practice, to refer to human activity. Praxis, a Greek word, refers to the whole of human action, in contrast to the activity of contemplating or merely theorising (Reckwitz, 2002), or, to borrow a phrase, praxis is "adaptive action" (Chia & Holt, 2006, p. 365). Whittington (2006) also introduces a third category, the *practitioner*, to represent the human actor carrying out the activity. Hence, these contextual parameters also situate the marketing specialist activity under investigation in this study.

For this research, *practices* refer to the shared routines of behaviour, i.e., marketing's traditions, norms, and procedures for thinking, acting, and doing things, in both a broad and narrow sense. *Praxis* refers to marketing activity, what marketers carry out on a daily basis. Moreover, the

practitioners under investigation are marketing specialists who understand and share marketing practices and perform marketing activities. Thus, Practice Theory represents both the efforts of the individual and social aspects of practice. Whittington (2006) suggests that the alliteration of the three themes: practices, praxis, and practitioners, reinforces a sense of mutual connection between the social and individual aspects of Practice Theory. A detailed description of practices, praxis, and practitioners in a marketing context follows.

2.4.2.1 Practices

Practices refer to a shared routinised type of marketing behaviour consisting of several interconnecting elements. These elements include physical procedures and activities, mental procedures and activities as well as tools and how to use them (Skålén & Hackley, 2011). In other words, one's training and 'know how' mingled with traditions, norms, and culture, informs and motivates how one considers and utilises ideas and 'things' when carrying out their work (Reckwitz, 2002). Marketing practices refer to a common understanding marketers have of marketing principles, procedures, language and tools (Skålén & Hackley, 2011). Intrinsic to 'doing', practices describe the behaviours, procedures, thinking patterns, and resources shared by certain practitioners in order to carry out a specific activity (Jarzabkowski et al., 2007). As these practices are performed in routinised ways, their patterns may be studied in order to find out how marketing activity is constructed (Jarzabkowski et al., 2007).

In a broad sense, marketing practices encompass shared and specialised knowledge and reside in the mind of the marketer (Reckwitz, 2002). Shared knowledge describes c understandings marketers have of marketing principles, procedures, language and tools. For instance, principles relating to selling, branding, the 4Ps of marketing, and knowledge on how to use tools in presenting, analysing data, and advocating customer perspectives (Reckwitz, 2002; Whittington, 2006). Despite being described as routinised, practices are flexible, fluid, diverse, and variable; with actors drawing from them and actively combining them to the situation at hand (De Certeau, 1984; Jarzabkowski et al., 2007).

In a narrower sense, practices may describe the awareness and expertise a marketer possesses due to the training and experience in the unique context in which they work. Hence, practices may not be 'shared', residing only in a specific marketer's mind due to his/her particular relationships, perspective, and experience, as well as their adaptation of shared practices (Ibarra, 1999; Reckwitz, 2002; Whittington, 2006). For example, specialised knowledge consists of knowledge of an industry, workplace, stakeholders, and associated networks, as well as the practitioner's and their peers' place and position within the firm. Apart from the unique context the marketer works in, specialised knowledge also consists of one's life story and experience in domains such as music, mechanics, or spiritual matters. These 'life knowledge' centres may be a significant contributor to the marketer making instinctive, logical, or creative decisions. Here, a knowledge of social norms or mores, cultural traditions, or 'how teenagers think' gleaned

from travelling and life-experience is likely to assist the marketer in generating effective solutions (Kilgour & Koslow, 2009).

According to research on marketing capabilities, an essential skill of a marketer was a willingness to learn, a discipline that perpetuates the increase and refining of practices (Gray et al., 2007; Lusch & Webster, 2010). Hence, practices are a critical antecedent to creative, innovative, or problem-solving activities (Kilgour & Koslow, 2009; Simonton, 2003). Therefore, marketing practices provide the marketing practitioner with a distinct and advantageous perspective of the market offering compared with other functions (von Koskull & Fougère, 2011). On the other hand, specific or general marketing knowledge does not guarantee satisfactory marketing solutions; research has shown that expert knowledge may limit a person's ability to generate creative ideas (Adelson, 1984). The predominant view, however, is that expertise is needed, but is not sufficient, in generating creative solutions (Kilgour & Koslow, 2009).

2.4.2.2 Praxis in Practice Theory

Praxes are the activity people carry out from their practices, whose activity is informed by theoretical knowledge and artfully interpreted and improvisationally performed (Echeverri & Skålén, 2011; Reckwitz, 2002; Whittington, 2006). More than an activity, praxis describes how experience itself becomes a vehicle for learning amongst an agent's background of learning, beliefs and values, and hence can be creative (Kolb, 1984; M. Smith, 2001). Western philosophy has been criticised for focussing too much on the theoretical or the contemplated life and neglecting the active life (Arendt, 1958). However, Practice Theory spotlights the dual sense of practice in social theory, where *practices*, i.e., that which guides activity, and *praxis*, i.e., the activity performed, are given prominence (Reckwitz, 2002; Whittington, 2006).

Activity in the field, according to Practice Theory, is structured and based on standard or understood practices. Actors have to know and use common practices, or at least relate to them, in order to act and to be understood by other actors in their domain (Bourdieu, 1990; Schau, Muniz Jr, & Arnould, 2009). Praxis is defined by informed, committed action, where people engage with a situation as committed thinkers and actors (M. Smith, 2001). Praxis is sometimes risky, as actors are required to make a prudent and practical judgement in a situation; sometimes in the moment (M. Smith, 2001). This stands in contrast with *poiesis*, a Greek term which means 'acting upon, doing to' when working with objects (M. Smith, 2001), For example, when mowing the lawns one hardly improvises with theoretical thought to achieve the task – often the one mowing their lawns is metaphorically 'on auto-pilot'. Likewise, while *poiesis* signifies activity, it implies only activity, rather than the additional application of theory, experience, and the creativity that praxis signifies.

The use of knowledge, experience, and creativity is perhaps best described by Bourdieu's (1990) metaphor of an athlete who, while walking onto the field, gets 'a feel for the game'. This feel is an instinctive, spontaneous response to the setting presented to the athlete; i.e., the posture of competitors and teammates, the spectators' attitude, and the will of the athlete (Allen, 2002). Furthermore, Bourdieu (1990) argues that throughout life, we take on an instinctual feel and get on with life by making decisions based on what feels right given the imminent conditions in which we find ourselves. Choices may sometimes be new, creative, and untested, yet may be made in the blink of an eye, as the situation demands (Allen, 2002).

2.4.2.3 Praxis in marketing

Järventie-Thesleff et al., (2011) describe praxis as marketers carrying marketing practices with them and performing them in various places around the firm. Although the term is not used, Moorman and Rust's (1999) study suggests that marketers' praxis consist of linking customers with various processes within the firm, i.e., the products, the service delivery and financial accountability. As previously discussed, connecting customers in these areas increases the perceived influence of marketers within the firm, and contribute to firm performance above that of market orientation. The authors' assertion here is that a vital praxis of marketers is their linking of customers to senior management and various functions within the firm in order to achieve customer acquisition and retention via customer satisfaction (Moorman & Rust, 1999). Alternatively, Verhoef and Leeflang (2009) argue when marketing practitioners engage in linking customers to the firm they are contributing to the market orientation of the firm.

Non-marketing personnel may also perform marketing duties satisfactorily, as long as those marketing duties are routinised. Here, the non-marketer has been informed of marketing practices either by experience, as in the case of senior managers (Webster, 2005), or by training. Marketing duties such as pricing, advertising budgeting, and new product decisions have reportedly been diffused to non-marketing personnel (Sheth & Sisodia, 2005; Webster, 2005). However, there may be an opportunity cost when the practices of a marketing specialist are not employed. Moreover, marketing specialists are vital in situations where the firm's current marketing paradigm is insufficient, and new praxes must be developed (Webster, 1997).

2.4.3 Practitioners in Practice Theory

Practitioners are the actors or human agents of practice; the minds and bodies who both carry and carry out social practices (Bourdieu, 1990; Reckwitz, 2002; Skålén & Hackley, 2011; Whittington, 2006). In Practice Theory terms, practitioners connect intra-organisational praxis and the organisational and extra-organisational practices they rely on (Whittington, 2006). Practitioners are not autonomous agents, nor slaves to the dictates their practice prescribes, but interpreters of practices (Bourdieu, 1990). This approach means that practitioners are neither slavish imitators nor, of course, wilful anarchists but depend on practices to deliver a unique,

improvisatory enactment when they perform (Reckwitz, 2002). An example of this is Bourdieu's (1990) card players who, while adhering to the rules and strategies of the game, bring to bear their calculated procedures when playing their hand.

Alternatively, practitioners within a management context develop practices by observing others and copying them (Ibarra, 1999). The practitioners then adapt and develop their practice in a way that not only conforms to broader social norms but also aligns with the actor's sense of identity and self. As practitioners carry and perform a variety of practices and are themselves reflexive actors reflecting on their training as well as the task at hand. Here, they can adapt existing practices and enact new praxis, which in turn may cultivate new practices (Skålén & Hackley, 2011). Therefore, Practice Theory describes a place where the tension of structure (the practices) and the agency (the practitioner) is performed as a dialectical relation (Skålén & Hackley, 2011).

There is widespread agreement that for new ideas to be considered, they must be both original and appropriate (Kilgour & Koslow, 2009; Mumford & Simonton, 1997; Runco & Charles, 1993), or put another way, appropriate and meaningful (Im & Workman Jr, 2004; Taillard & Kastanakis, 2015). While the creative or imaginative mind might produce original or novel ideas, knowledge of both marketing practices and the firm help to fashion appropriate ideas. The ability of personnel to combine and reorganise thoughts, including known practices, that result in creativity and innovation is essential for organisational success (Argyriou et al., 2009; Mumford & Simonton, 1997). In marketing literature, creativity has been defined as the marketing department's ability to develop meaningful deviations from common marketing practices in product and service categories (see Andrews & Smith, 1996; Titus, 2000; Verhoef & Leeflang, 2009). However, in both Verhoef and Leeflang (2009) and Verhoef et al., (2011), creativity was found to have no significant bearing on the marketing department's influence. Creativity in marketing often refers to novel marketing practices in new products or marketing programs, which may fail to attract customers due to the inertia of current offerings (Im & Workman Jr, 2004). Innovation, on the other hand, refers to the more tangible practice of contributing to the development of new offerings; hence creativity is arguably harder to measure (Verhoef & Leeflang, 2009). Im and Workman (2004) argue that creativity is an antecedent of innovation but should be tempered with meaningfulness, that is, offerings produced should be useful to the target audience.

Coming up with ideas or solutions is not a domain exclusive to marketers; in the context of a firm, all personnel may have the ability to develop creative ideas. The question is who, the marketer or non-marketer, is most likely to produce original and appropriate marketing ideas for the firm to implement? Although non-marketers may have some understanding of marketing practices, are non-marketers sufficiently equipped to come up with creative and appropriate solutions in a turbulent marketplace? It is feasible, but research suggests that having an

experienced marketer would certainly lend confidence to the firm when new ideas are presented (Kilgour & Koslow, 2009). For instance, Merlo (2011) describes the influential power marketers possess due to the perception that their specialist knowledge provides critical contingencies in turbulent markets. In other words, specialist marketers are more likely to provide the firm with more confidence and reduce uncertainty than non-marketing personnel when making marketing decisions. On the other hand, expertise does not guarantee marketers will generate creative and appropriate solutions to problems. As mentioned, studies show that expertise in a particular domain may inhibit creativity (Kilgour & Koslow, 2009).

Another common problem is that the specialist marketer may not have all the expertise they need when solving a situation. Integration, collaboration, or as Lusch and Webster (2010) put it, resourcing human ingenuity, is therefore required. By resourcing human ingenuity, the volume of practices (shared and specialist knowledge) is increased as well as the possibility of sparking creative ideas (Dennis, Minas, & Bhagwatwar, 2013). Brainstorming has been used in firms for decades and is affected by the various characteristics 'at the table'. Contributing factors include each participants' domain knowledge and cognitive skills, the cohesion and diversity of the team, and the firm's culture and resources (Dennis et al., 2013). Brainstorming, as an informal or formal process, is an example of how marketers might interact with each other and other functions to generate solutions in firms. Various marketing academics have asserted that marketing has a direct influence on the market orientation of a firm, which affects firm performance (Argyriou et al., 2009; Moorman & Rust, 1999). Further, engaging third-party consultants and less formal arrangements such as 'water-cooler conversations' are also other instances that foster the resourcing human ingenuity (Lusch & Webster, 2010) in the pursuit of fostering practices.

2.4.4 Firms and marketplaces in Practice Theory

In Practice Theory, firms are defined as bundles of practices and physical arrangements, made up of various types of practices such as purchasing, production, selling, and administration (Schatzki, 2005). Each bundle consists of sets of activities, routines, and physical arrangements that identify them as individual practices, and practices that coordinate with other bundles within and outside of the firm (Schatzki, 2005). Accordingly, Reckwitz (2002) asserts that firms as a social structure are comprised of physical and mental routines: routines in understanding, desiring, sharing, and using things. However, while specific tasks in the firm may be routinised, the marketplace is far from a routinised environment. Market turbulence, i.e., opportunities, crises, or some catalyst, invariably breaks or shifts the routinised activity or structure of a firm, impinging on organisational routines and causing change. Ironically, one form of market turbulence is the continuous result of applied marketing practices, i.e., the marketing praxis of other firms in a competitive environment (Kjellberg et al., 2012).

Further, marketing influence studies generally concur that marketer influence strengthens in turbulent rather than stable or monopolistic markets (e.g., Merlo, 2011; Verhoef & Leeflang, 2009). Therefore, the context of this research is the development of a marketing project in response to a situation facing the marketer's firm. Situations typically describe catalysts that break routinised organisational structures like market turbulence generated by competitor moves, technological or political changes, or perceived shifts in consumer needs (Narayanan & Fahey, 1994; Reckwitz, 2002). Situations, whether perceived as crises or opportunities, that impinge on a firm's routinised structures and activities may require short or long-term solutions (Reckwitz, 2002; Webster & Lusch, 2013); solutions are typically referred to as marketing projects. Unsurprisingly, the essential skill marketers require, after the marketer's ability to fit within the firm, was the ability to apply marketing knowledge to solve or take advantage of, situations (Walker et al., 2009). Hence, this research adds a further parameter to Whittington's (2006) triad of practitioners, practices, and praxes, by using the context of the *projects* that each case undertakes.

Despite this research's focus upon marketing specialist practices, practitioners are absorbed in their day-to-day work and are typically *unaware* of the practices they are carrying out (Sandberg & Tsoukas, 2011). However, within a particular *project*, practitioners become deliberate, aware, and detached from their practices, enabling them to see the significance of their thoughts and actions as "an array of discrete activities" (Sandberg & Tsoukas, 2011, p. 345). Therefore, in order to collect clearer perspectives on the practices of marketing specialists and their influence, marketing projects developed in response to a specific project were investigated. Detailed information on each of the case study's projects of this research is provided in Chapter 4.

2.4.5 Levels of influence

In applying Practice Theory, the researcher is obligated to consider both human and societal factors (Reckwitz, 2002). As mentioned, Practice Theory differs from other approaches in that instead of focusing specifically on intra-organisational or extra-organisational levels; it seeks to integrate them both (Whittington, 2006). For instance, past practices studies have shown an interest in activities at a practitioner level as well as how praxes influence a broader context within and external to the firm (Denis, Langley, & Rouleau, 2007; Jarzabkowski et al., 2007). To distinguish these levels, the terms micro, mezzo, and macro are employed (Jarzabkowski & Spee, 2009). Therefore, for this research:

- The marketing specialist level refers to the micro level, where the practices and praxis of marketing specialists influence other marketing specialists.
- The firm-level indicates the mezzo level, where the practices and praxis of marketing specialists influence those within their firms such as non-marketing colleagues, managers, board members, or stakeholders.

- The market level refers to the macro level, where the practices and praxis of marketing specialists are complicit in influencing their market, including their competitors (Araujo et al., 2008).

In previous practice studies, distinguishing various levels in which the marketing practitioners worked provided further insight into how they were influential. For example, Jaakkola's (2011, p. 222) marketing-as-practice article on "productization" illustrates how marketing praxes influenced their firm's micro and mezzo levels. At the micro level, the author found marketers specified and standardised the service offering. Next, at the mezzo level, the study reported that marketers systematised and standardised processes and methods by introducing unified methods and tools throughout the firm (Jaakkola, 2011). Further, Fellesson's (2011) article on customer's organisational enactment within the public sector provides an example of macro influence. The study reconceptualises customers as a flexible resource to draw on for market-sensing at a local level, rather than an expression of an imposed structure of power and knowledge. Subsequently, this finding has implications at an institutional/industry level where customers may now be seen in another light, specifically as a potential market research resource. As in the case of Jaakkola's (2011) research, practice studies often examine or span more than one level of marketing practices influence.

2.4.6 Summary of Practice Theory

As shown, Practice Theory focuses the researcher toward the marketing practitioner, the practices they carry, and the praxis they carry out within a specific situation. Further, this research extends these parameters by including each case's project. This approach provides a cogent lens for research on marketing specialist knowledge and its influence (Whittington, 2006). Moreover, as processing knowledge draws upon implicit learning, conditioning and internalisation of principles (Evans, 2011; Heijltjes et al., 2014), the use of Practice Theory again appears suited to the investigative task. Hence, as Practice Theory focusses upon that which guides activity and the activity itself, it provides a convincing theoretical lens for examining marketing specialist knowledge and its influence (Reckwitz, 2002). Additionally, due to its concern with various levels, this research aims to provide new insights into how new marketing projects emerge, how they influence the firm (Morgan, 2012), and their marketplace (Araujo et al., 2008). In doing the above, Practice Theory has led this investigation toward a focussed examination of a practitioner's work-life (Dibb et al., 2014). Consequently, a Practice Theory approach is likely to satisfy some of the calls toward more performative depictions of what marketing specialists do (Araujo et al., 2008).

2.5 Summary

The key thesis of this research is that further understanding of the knowledge, practices, praxes, and influence of marketing specialists may have academic and commercial significance.

Although studies show that marketing department accountability, innovation, customer connection, and market-sensing capabilities contribute to their firm's performance (Moorman & Rust, 1999; Verhoef & Leeflang, 2009; Wirtz et al., 2013), further insight into marketing specialist knowledge and their influence is needed. Currently, our understanding of marketing specialist skills, capabilities, competencies, and influence are typically isolated from work-life environments and their use in specific categorical ends (Jaworski, 2011; Sandberg & Tsoukas, 2011; Skålén & Hackley, 2011). For instance, Rossiter (2001) discussed marketing knowledge within academic spheres for pedagogical purposes. His article sought to identify the nature and forms of marketing knowledge, describing its nature as "know what", as opposed to marketing skills, or "know how" (Rossiter, 2001, p. 10). Also, Gray et al., (2007) and Walker et al., (2009) researched the skills and competencies of marketers in order to optimise their managerial purposes. Despite these practitioner-based studies, calls for further investigation into marketing specialist practices, (Ardley & Quinn, 2014; Dibb et al., 2014; Skålén & Hackley, 2011) and influence have been made.

Overall, the extant literature has focused on the nature, form, skill, and competencies of marketing departments, rather than marketing practitioners themselves (Dibb et al., 2014; Jaworski, 2011; Kjellberg & Helgesson, 2006). Little is known about how marketing specialists' knowledge accumulates, is stored, drawn upon, and processed, and its subsequent influence upon other marketing specialists, the firm, and upon the market. Therefore, an investigation into marketing specialist knowledge in a work-life context is warranted for insights it may provide about itself and how and why it influences firms and their performance. Also, insights into marketing specialist knowledge and how it links to their influence may assist business management practices and performance as well as organisational education in the future.

The topic of knowledge was tackled by Aristotle, who conceptualised it the coalescence of data, technical skill, and judgement (Tooman et al., 2016). Within a business context, marketing knowledge was one of the earliest recognised determinants of firm performance and competitiveness (Shaw, 1912; Weld, 1916). Although academics have discussed how marketing knowledge might be understood (e.g., Rossiter, 2001), they have received criticism for being limited conceptualisations compared to how knowledge is utilised in the marketing practitioner's work-life (e.g., Brodie, 2002; Ottesen & Kjell, 2004).

To assist in determining how their knowledge may be broadly constituted, five knowledge domains of the marketing specialist emerged from a review of the literature. These domains were marketing expertise, organisation familiarity, market intelligence, leadership, and life experiences. These knowledge domains also serve as meta-level themes to guide the recognition of marketing specialists' shared practices at the marketing specialist, firm, and market levels during data analyses. To examine how knowledge is processed, literature regarding the nature of

rational thinking (Heijltjes et al., 2014; Stanovich et al., 2011), and critical thinking (Berzins & Sofo, 2008), were reviewed, as both processes link marketing knowledge and its influence (Jarzabkowski et al., 2007; Klebba & Hamilton, 2007).

Therefore, using Practice Theory, this research examines marketing specialist knowledge and its influence by identifying the practices they engage during marketing projects, and how and why these practices are influential. Practice Theory is relevant as a suitable lens due to its ‘aims at the demystification, deepening and appreciation of the “nitty-gritty details’ of routine and practice” (Carroll et al., 2008, p. 364). Along with Whittington’s (2006) focus upon the practitioner, their practices, and their praxis, this investigation adds a fourth element to this practice-based investigation, their ‘project’. The requirement of investigating practitioners, their practices, their praxis, while working on their marketing projects adds further context the work-life activities of marketing specialists. Hence, the shared and routinised activities and behaviour while planning, developing, implementing, and appraising marketing projects across cases are more likely to be identified. Therefore, by focussing the research toward richer, more penetrative insights of a practitioner’s work-life (Dibb et al., 2014), the practice approach aims to provide new insights into marketing specialists knowledge and its influence.

2.6 Research questions

Within the context of a marketing project, this research seeks to use Practice Theory to examine marketing specialist knowledge and its influence. Therefore, the research problem is:

How and why do marketing specialists' knowledge influence firms and their performance?

In line with previous Practice Theory research (cf. Jarzabkowski & Spee, 2009), marketing specialist knowledge and its influence will be investigated at three levels: the marketing specialist, the firm, and the market levels. By introducing Practice Theory to address the knowledge and activities of marketing specialists, the research questions are stated:

RQ1: What are the practices marketing specialists draw on to plan, develop, implement, and appraise a marketing project?

RQ2: How and why are their practices and praxes influential at the marketing specialist, firm, and market levels?

In answering the research question, the following research objectives will be met:

1. To classify the main knowledge domains of marketing specialists
2. To identify marketing specialists’ practices as they:
 - a. plan
 - b. develop

- c. implement
 - d. and appraise a marketing project
- 3. To determine the constitution of each of the practices identified
- 4. To examine how these practices are used in the marketing specialists' thinking and decision-making processes
- 5. To determine the marketing specialists' praxes at three levels, specifically:
 - a. among other marketing specialists
 - b. their firm
 - c. and their market
- 6. To determine how and why the marketing specialists were influential at these levels.

Hence, this study seeks to investigate marketing specialist knowledge and its influence using Practice Theory, a theoretical lens by which the practitioner, their practices, and praxes are investigated (Whittington, 2006). In line with these aims, the following chapter discusses this investigation's research design.

Chapter 3 Research design

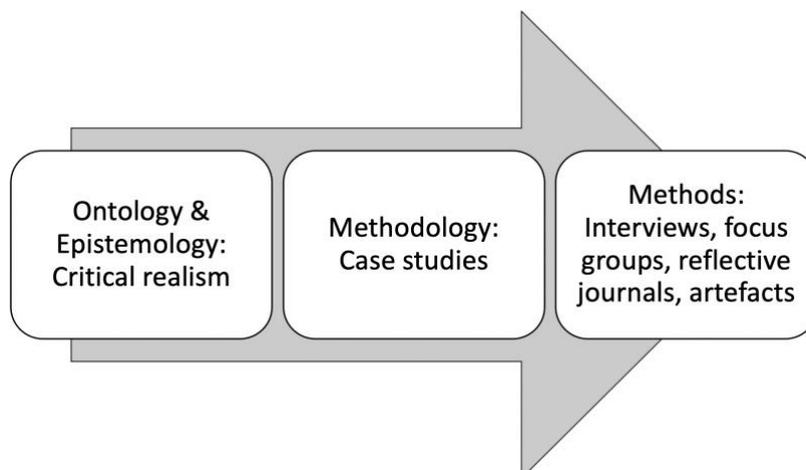
3.0 Introduction

This chapter begins by discussing the qualitative approach that underpins this research's design followed by Section 3.2 which restates the research question. Next, Section 3.3 describes the research's case study methodology and Section 3.4 details the four methods and instruments used for data collection. Following on, Section 3.5 and 3.6 justifies and discusses the within-case and cross-case analysis methods used respectively, and Section 3.7 explains how the data was analysed and coded. Next, Sections 3.8 and 3.9 consider the quality assurance and ethical integrity of this research. Finally, Section 3.10 provides a summary of this chapter.

3.1 Qualitative approach

A theoretical framework describes how the researcher looks at the world and makes sense of it (Crotty, 1998). Hence, the theoretical framework considers the researcher's ontology, or considerations of being, as well as their epistemology, i.e., how the researcher believes knowledge is created. Once the researcher's epistemology and research question are established, the researcher's methodology develops the systematic research approach the researcher will take. Within the methodology, the methods and the various tools the researcher will employ to collect the data are decided upon. By means of introduction, this research design has its ontological and epistemological roots in critical realism. Furthermore, it adopts case studies as its methodology, and employs semi-structured interviews and focus groups, as well as collects reflective journals and relevant artefacts as its data collection methods. See Figure 3.1 for a summary:

Figure 3.1: Qualitative approach and data collection method



3.1.1 Ontology and epistemology: Critical realism

The philosophical underpinning for this research is post-positivism, or more specifically, critical realism. Critical realism is a philosophical movement instigated primarily by Roy Bhasker and responds to the extremes of positivist certainty and postmodern scepticism (Wright, 2013). Essentially, critical realism core philosophical principles consist of ontological realism, epistemic relativism, and judgemental rationality to reach conclusions (Wright, 2013). Ontological realism agrees with the positivist argument that reality exists independently, for the most part, of our perception of it or our ability to describe it (Easton, 2010; Sayer, 1992). However, critical realism disagrees with the positivists' assertion that reality is restricted to idealised concepts and empirical sense data. Instead, critical realism's epistemic relativism asserts that our perception and knowledge of reality is limited and contingent due to each person's disposition and worldview (Wright, 2013). However, contrasting postmodernism's scepticism, critical realism's judgemental rationality asserts that while all accounts of reality are not equal, one may judge some accounts as more accurate or truthful than others (Wright, 2013). Here, judgemental rationality is mediated through coherent research and methods of logic as well as reflexivity and personal introspection (Wright, 2013).

Critical realism has been described as having a stratified ontology consisting of the empirical, the actual, and the real (Bhaskar, 1978). The empirical strata of this research consists of data (Bhaskar, 1978), i.e., the transcripts, journal entries, and artefacts collected from each of the four case studies conducted in this study. The empirical domain provides a portrayal of the experiences and physical products of each case. The *actual* relates to objects and events within the scope of the case studies which was either not observed or have been observed but interpreted differently by participants (Bhaskar, 1978). Critical realism acknowledges that despite what actually happened during the marketing project of each case, events occurred unobserved, or if observed, might be interpreted inaccurately. The real stratum consists of the underlying causal structures and generative mechanisms that generated the state of affairs (Easton, 2010). While it is possible to observe and describe the real and empirical domains, they are not always capable of being observed. As Easton (2010, p. 123) asserts, "We see just the tip of an iceberg but that doesn't mean that the invisible three-quarters is not there or is unconnected to what we see". Therefore, the case study methodology and methods were designed to elicit multiple sources of empirical data regarding the marketing specialist's knowledge and influence. In this way, accurate conclusions regarding the empirical, actual and real strata might be reached.

Critical realism has been discussed by multiple academic practitioners. These discussions help inform and justify critical realism's use among the plethora of theoretical lenses available to researchers. For instance, Creswell (2012, p. 24) says, "Post-positivism has the elements of being reductionistic, logical, empirical, cause-and-effect oriented, and deterministic based on a

priori theories.” The critical realist agrees with positivistic view of a reality that is independent of our thinking, but also with subjectivist views that all observation is fallible and theories are revisable (Trochim, 2006). Therefore, critical realists are critical of our ability to know reality with certainty because methods of measurement are fallible (Creswell, 2012; Trochim, 2006).

Post-positivists believe in collecting points of view from multiple sources rather than a single reality and employing rigorous qualitative data collection and analytical methods (Creswell, 2012). Hence, Creswell (2012) recommends post-positivists use the systematic procedures of grounded theory developed by Strauss and Corbin (1990), or strategies of data analysis used in case studies (Yin, 2009). Critical realists recognise that they are inherently biased due to their worldview, cultural background, values, interests, and status (Hunt, 1993). As the researcher may not be conscious of the influence of the amalgamation of their experiences or upbringing during their research, triangulation helps to mitigate these biases (Stake, 2010). Therefore multiple participants and data collection methods were involved in this research.

3.2 Research questions

As mentioned, the research problem is:

How and why does marketing specialists’ knowledge influence firms and their performance?

The research questions are stated:

RQ1: What are the practices marketing specialists draw on to plan, develop, implement, and appraise a marketing project?

RQ2: How and why are their practices and praxes influential at the marketing specialist, firm, and market levels?

In answering the research questions, the following research objectives will be met:

1. To classify the main knowledge domains of marketing specialists
2. To identify marketing specialists’ practices as they:
 - a. plan
 - b. develop
 - c. implement
 - d. and appraise a marketing project
3. To determine the constitution of each of the practices identified
4. To examine how these practices are used in the marketing specialists’ thinking and decision-making processes
5. To determine the marketing specialists’ praxes at three levels, specifically:
 - a. among other marketing specialists
 - b. their firm

c. and their market

6. To determine how and why the marketing specialists were influential at these levels.

3.3 Methodology

As stated, the purpose of this research is to examine specialist marketing knowledge and its influence. To this end, practice theory, a theoretical perspective which discusses that which guides activity and the activity itself was implemented (Reckwitz, 2002). A starting point is to understand not only what practices the marketing specialist drew from, but how they were applied toward an objective such as a marketing project. How and why marketing specialist knowledge is influential is new theoretical ground (Ardley & Quinn, 2014). Therefore, while collaborating with marketing and management influence literature, this research was sensitised toward interpreting how and why marketing specialist practices were carried out. In other words, the research looked beyond what knowledge marketing specialists used, interpreting rather how this knowledge was actioned and why. In doing so, the aim was to provide valuable insight into the influence of specialist marketing knowledge at the marketing specialist, firm, and market levels.

Investigations usually ask 'what', 'where', or 'how many' type questions. Recent research into marketing's influence, for example, has often employed fixed point surveys to measure known antecedents of marketing influence and to investigate and compare their significance in firms (e.g., Merlo, 2011; Verhoef et al., 2011). Moreover, using archival-based research, Dibb et al., (2014) analysed marketing textbooks and marketing job advertisements before surveying practitioners to ascertain the scope of marketing practice. However, research methods that employ closed-ended responses fail to uncover in-depth descriptions, nuances and dynamic interactions between the thoughts and actions of actors in a business context. The above methods are preferred in studies where participant's assessments and intentions can be easily collected, but are impractical in retrieving real-life narratives (Woodside, 2010). Therefore, in order to sufficiently address the cognitive domain (marketing specialist knowledge) and work-to-market phenomena (and its influence) addressed in the research question, case studies were used to gather data.

3.3.1 Case studies

Researchers use case studies to develop theories in a myriad of social science disciplines to make sense out of complex social phenomena (Eisenhardt, 1989; Eisenhardt & Graebner, 2007; Yin, 2009). Case studies provide rich, empirical descriptions of a particular instance of a phenomenon often derived from recent events and several data sources (Yin, 2009). Case studies are employed as a basis to build theory inductively by recognising patterns of relationships or themes from constructs within and across cases and their underlying logical arguments (Eisenhardt & Graebner, 2007). Consequently, the case study's method of being deeply embedded in rich real-world contexts makes it possible to develop theory that is

accurate, testable, and interesting (Eisenhardt & Graebner, 2007). This outcome is possible as case studies 'bridge' rich qualitative data to mainstream deductive research by developing constructs, measures, and testable theoretical propositions (Eisenhardt & Graebner, 2007; Yin, 2009). To summarise, Eisenhardt (1989) suggests that case studies build and extend theory as the researcher goes back and forth among the study's framework, data sources, and analysis.

Case studies are a qualitative approach in which the researcher examines real-life contemporary bounded systems through detailed, in-depth data collection involving multiple sources of information to answer a research question (Creswell, 2012). Case studies help researchers to gain deep understanding of the phenomena in focus. In particular, case studies are used to record how participants engage in sense-making, i.e., how they make sense of stimuli and the mental models they develop. Mental models depict the participants' portrayal of the causes, events, and outcomes of the relevant case, which describe the 'typical' steps (i.e., persons, conversations, behaviours, and events) that occur in the process being studied by the researcher. Also, the steps that should occur in the typical process (i.e., the participant's normative mental model). That which actually occurred in a given process 'strategically' important for the organisation. And the participant's perceptions of how another specific person or others in the organization, in general, understand the details of the process being examined (Woodside, 2010, p. 8).

It was decided that multiple case studies would be an appropriate research method being compatible with practice theory due to their emphases on investigating situated phenomena at a practitioner level (Echeverri & Skalen, 2011; Eisenhardt & Graebner, 2007; Jarzabkowski & Spee, 2009). Therefore it was expected that case studies would yield rich, thick descriptions of marketing specialist knowledge and their influence as they carried out a marketing project (Creswell, 2012; Yin, 2009).

Case studies are designed to focus on a specific and explicit process in order to explore and scrutinise that process in detail (Bryman & Bell, 2011; Creswell, 2009). Bryman (2011) suggests there are four features that make-up case studies: an organisation, a location, a person, or an event. To link these aspects of suitability of case studies, this research is focused on marketing projects (events) in four firms (organisations). Also, descriptions of the marketing projects are provided by marketing specialists and stakeholders both internal and external to each firm (persons), with each case situated in New Zealand (location).

As mentioned earlier, research methods are employed for exploratory, descriptive, and explanatory purposes (Yin, 2009). Here, explanatory case studies are the preferred research method as the following three instances apply. First, 'how', or 'why' questions are being asked. Second, the investigator has limited control over the events (i.e., non-laboratory conditions). Third, the focus is on contemporary phenomena in a real-life context (Yin, 2009). With this investigation, the research question fits the explanatory case study criteria by asking 'how' and

‘why’ questions relating to marketing specialist knowledge and its influence. Moreover, the context of the investigations are the marketing projects of four organisations conducted in a contemporary context in which the researcher had no input or control. Therefore, an explanatory case study research method was selected, rather than an exploratory or descriptive method.

3.3.2 Research design

Case studies, like other research methods, have an implicit research design (Yin, 2014). The research design includes the pre-specified procedures or boundaries that connect the data collected with the research question and ultimately to the derived theory, conclusions, and recommendations (Eisenhardt & Graebner, 2007; Yin, 2014). This process includes deciding what questions need to be answered, and how to collect, analyse and interpret the relevant data (Philliber, Schwab, & Sloss, 1980). According to Yin (2014), the research design is made up of five components:

1. The study’s questions
2. The study’s propositions
3. The unit of analysis
4. Linking data to propositions
5. The criteria for interpreting the findings

1. Study questions

When considering the type of research method to use, Yin (2014) suggests considering the nature of the research question, how much control the researcher has over events, and the degree to which the event is contemporary or historical. Further, to determine the suitability of case studies, the research question would typically ask “how” or “why” questions. This research seeks to examine marketing specialist knowledge and its influence by identifying the practices marketing specialists engage with to plan, develop, implement, and appraise a marketing project. The research also seeks to examine how and why these practices are influential at marketing department, firm and market levels. Therefore, these questions fulfil the suitability for case study research and satisfy the practice approach’s obligation to describe the intra- and extra-organisational implications of the influence of marketing specialist knowledge.

2. Study propositions

The study’s propositions focuses on something that should be examined in the scope of the study (Yin, 2014). Based on relevant marketing and management literature, this study proposes that the practices marketing specialists draw on come under five broad themes. These themes are marketing expertise (cf. Svensson, 2007), organisation familiarity (Whittington, 2006), market intelligence (Kjellberg et al., 2012; Lusch & Webster, 2010), leadership skills (Ramaswamy, 2009), and life experience (Andrews & Smith, 1996). This research further proposes that the aggregation and processing of these practices engender praxes that are more original and appropriate, and therefore influential, when compared to those offered by non-

specialists (cf. Doyle, 1995; Kilgour & Koslow, 2009; Moorman & Rust, 1999; Verhoef et al., 2011). These proposals help the researcher iterate between current theory and the data to generate new theory.

Table 3.3.2: Research propositions

- | | |
|----|--|
| P1 | Marketing specialist knowledge consists of a bundle of practices including marketing expertise, organisation familiarity, market intelligence, leadership skills, and life experience. |
| P2 | Marketing specialists are reflexive in that the practices and sources they draw from help them plan, develop, implement, and appraise a project. |
| P3 | The aggregation and processing of the practices that constitute marketing specialist knowledge are linked to their influence of other marketing specialists, their firm, and their market. |
| P4 | The influence the marketing specialists have with one another, the firm, and the market is scaffolded and iterative. |

3. *Units of analysis*

The case study research design process calls for careful consideration of the unit of analysis (Yin, 2014). This research seeks to examine the practices involved in marketing specialist knowledge, as well as how and why these practices are influential at marketing department, firm and market levels. Therefore, the units of analysis in this study are marketing specialists' knowledge, practices, and influence used in the context of their marketing projects.

4. *Linking data to propositions*

The final two components of the research design process foreshadow the data analysis steps in case studies. First, the correct analytic techniques, which include pattern matching, explanation building, time-series analysis, cross-case synthesis, and logic models needs to be selected (Yin, 2014). For this research, pattern matching will be used to link the case data collected with the research propositions. This deductive analysis method compares the theory-based propositions with the collected data, where empirical support for the propositions strengthens the research's internal validity (Yin, 2014). Also, due to the heterogeneity of firms, cross-case synthesis, a data analysis strategy specifically used in multiple case studies, will also be used to look for similarities and differences between each case (Creswell, 2012; Yin, 2014). It is anticipated that the different organisational context of each case will prove the propositions in various ways. For instance, the types of marketing expertise a marketing specialist from an FMCG firm draws from may differ from those from an international non-profit. Analysis of these differences may provide interesting insights into the themes of shared and collective marketing specialist practices and their influence.

5. *Criteria for interpreting the study's findings*

The criteria for interpreting the study's findings focus the interpreter toward certain data while ignoring other data. The two main criteria for interpreting this study's findings are the theoretical propositions and examining rival explanations (Yin, 2014). Basing the criteria for interpreting the findings on the research's theoretical propositions is a preferred strategy, as they reflect the objectives, design, and research questions of the case study (Yin, 2014). Also, propositions stemming from "how" and "why" questions help to organise and guide the entire case study as well as define alternative explanations that can be examined at a later date (Yin, 2014). In addition, as part of interpreting this study's findings, the data collection and analysis will include and examine rival explanations (Yin, 2014). For instance, as already mentioned, Verhoef et al. (2011) list various marketing capabilities and Merlo (2011) describes power variables that are attributed as determinants of the marketing department's influence. Therefore, this study will include previous marketing theory as part of its analysis so that the data collection and analysis will be balanced, rather than biased in favour of this study's propositions (Patton, 2002; Yin, 2014).

3.3.3 Strengths and limitations of case studies

Investigating multiple cases, using a range of data collection methods, and access to a mixture of participants who worked on each case's marketing projects is a strength of this research. This way, information on the marketing specialists' knowledge and their influence is collaborated by various points of view and contexts (Simons, 2009). However, due to capturing data related to only specific marketing specialists during specific marketing projects, the scope of generalising this research's findings is limited (Simons, 2009). With regard to weaknesses in research methodologies, Eisenhardt (1989) recognises that due to a large amount of data there is a temptation to build theory that is overly complex or that captures everything. However, case studies have an implicit research design which includes pre-specified procedures that connect the data collected with the research question and ultimately to the derived theory, conclusions, and recommendations (Eisenhardt & Graebner, 2007; Yin, 2009). This process includes deciding what questions need to be answered, and how to collect, analyse and interpret the relevant data in a way that aims to reduce the limitations of the case study method (Philliber et al., 1980).

3.3.4 Purposive sampling

In selecting firms for this research, purposeful sampling was used (Eisenhardt, 1989; Perry, 1998; Yin, 2009). To begin, four firms were selected to participate; a recommended amount when doing multiple case studies (Yin, 2009). These firms were medium to large firms that employed marketing specialists who had recently completed, or were in the process of completing, a marketing project. To ensure purposeful maximal sampling (Creswell, 2012, p. 100), firms were selected from heterogeneous industries: Tourism Bay of Plenty is a regional

tourism organisation; Zespri is an international horticultural marketing and exporting company; Trustpower is a national energy and telecommunications retailer; The InterCity Group is a national passenger transport franchise. See Table 3.3 for a summary of participating firms and participants.

Selecting heterogeneous firms as cases provides a diversity of perspectives which enhances the identification of common patterns of marketing specialist knowledge and influence (Creswell, 2008; Miles & Huberman, 1994). It was also preferred that firms employed marketing specialists with a minimum of two years' experience as they have more knowledge and project experience than those less senior (Malshe, 2010). This stipulation was important as the research seeks to distinguish the knowledge and influence of marketing specialists from others who carry out marketing activities. Due to convenience, only New Zealand firms were approached (Patton, 2002).

Table 3.3: Summary of sampling design

Firm	Summary of firm and marketing project	Participants
Tourism Bay of Plenty	A regional tourism organisation who underwent a rebranding project after a shipping disaster had reduced tourism in the area.	Interviewees: Marketing specialist, senior manager, board member, 2 x marketing consultants Focus group: 3 x Tourism operators
Zespri	A horticultural exporting company who, after conducting extensive consumer research, developed an internal marketing project incentivising growers to produce sweeter kiwifruit for export.	Interviewees: 2 x marketing specialists, marketing consultant, 2 x projects managers Focus group: 3 x Kiwifruit orchard managers and owners
Trustpower	An energy and telecommunications retailer who, after bundling power, broadband, phone, and gas utilities, developed marketing projects designed to penetrate metropolitan centres.	Interviewees: Marketing specialist, senior manager, senior manager, 2 x marketing consultants Focus group: 5 x Staff: Sales, operations, administration, and frontline staff
The InterCity Group	A national passenger transport franchise who underwent a rebranding project.	Interviewees: Marketing specialist, senior manager, board member, 2 x marketing consultants Focus group: 5 x Staff: Sales, operations, marketing, administration, and frontline staff

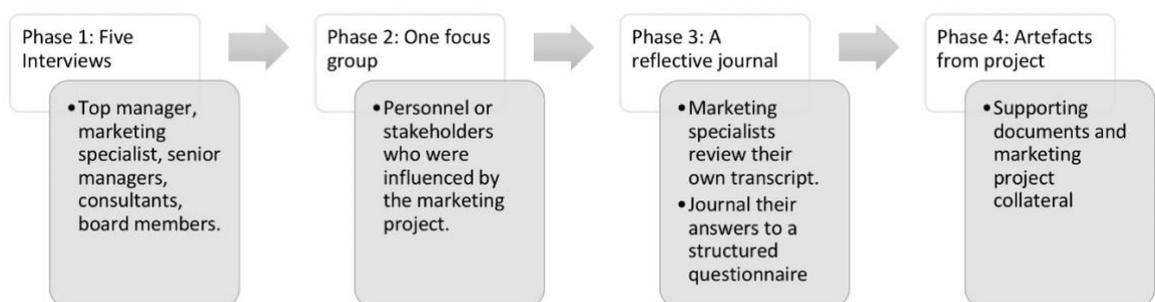
As mentioned, the diversity of cases is used to produce contrary results for predictable reasons, for the purpose of generating theoretical replication (Creswell, 2012; Perry, 1998). However, each organisation shared certain characteristics. For instance, they had in their employment a marketing specialist and they had recently undertaken a major marketing project. In addition, the organisation's marketing specialist was complicit in planning, developing, implementing,

and appraising the project. These commonalities were needed to help produce literal replication within the scope of the study (Perry, 1998).

3.4 Procedures for Evidence Collection

For each case, a four-phase procedure for collecting evidence to answer the research question was implemented; see Figure 3.4 for an overview. Each of the four phases were selected as an appropriate and optimal approach to collect data, with the combined phases assisting in triangulating the participants' responses during analyses. Phase one consisted of one-on-one interviews with the firm's senior manager, marketing specialist, and three other respondents who were integral to the marketing project, including third-party consultants. The term "senior manager" is used throughout this study to represent the general managers or CEOs who were interviewed. Once the audio recordings from phase one had been collected, correctly transcribed, and analysed, the next phase began. Phase two consisted of a focus group made up of people from within or external to the firm. The participants included frontline staff, salespeople, or other stakeholders who were influenced by the marketing project and were not involved in the one-on-one interviews. Each focus group was audio recorded, their transcriptions were checked for accuracy and analysed. In phase three, marketing specialists were asked to complete a journal over a two week period that consisted of five questions. The two week period allowed the marketing specialists time to consider and reflect on their entries. At this time, the marketing specialists were also asked to read and check their interview transcript. In phase four, documents and artefacts such as DVDs, slide presentations, and television commercials in the form of digital files were collected. The objective of each phase was to collect data on marketing specialist knowledge and their influence during a marketing project.

Figure 3.4: The four phases of data collection



The data collecting methods of one-on-one interviews, focus groups, reflective writing, and collection of artefacts were used due to their suitability for capturing the respondents' "lived world" (Kvale, 1996, p. 189). During the data collection process it was assumed that employees, third-party contractors, and stakeholders who participated were known by management, and that participants were "politically conscious actors" (Alvesson & Deetz, 2000, p. 195). Therefore,

despite being asked for candidacy, these participants may have exercised reflexivity, intentionality, and discretion during the interviews (Carroll et al., 2008). With this caveat in mind, the procedure for collecting evidence and justifying these procedures are discussed in more detail next.

3.4.1 Suitability for study

To determine whether or not a particular organisation was a suitable case for this research, potential organisations were contacted and informed of the nature of the research. Therefore, the senior manager and marketing manager were asked some qualifying questions:

3.4.1.1 Qualifying questions for purposive sampling

- Has your marketing specialist recently completed a marketing project in response to a situation your organisation was facing?
- How long has your marketing specialist been:
 - A marketer?
 - Your employee?
- Has the marketing project been completed?
- Apart from the marketer, who else was involved in the project?
 - Was a third-party specialist involved in the project?
- Can you provide examples of performance outcomes achieved by the project?
- Would you consider allowing your organisation to be a participant in this research?
 - Being a participant would require:
 - Interviews with the senior manager, marketing specialist, and three other people (either from your firm or a third-party specialists) who were involved in the marketing project
 - A focus group with personnel or stakeholders who were influenced by the marketing project
 - Having your marketing specialist provide some written material regarding the marketing project
 - Collecting commercially non-sensitive documents relating to the marketing project

If the potential respondent's replies were promising, he or she were then asked if the organisation would like to participate in the research.

The four phases and variety of personnel were needed to help ensure the objectivity and trustworthiness of this research. As the focus of this research is marketing specialist knowledge and their influence, a variety of perspectives was required. A reason for this measure is that participants in decision-making processes are likely to overstate their influence (Atuahene-Gima & Evangelista, 2000; Kohli, 1989). Therefore, the marketing specialists as well as the other

participants were purposively selected due to their involvement in their firm's marketing project and also because of their perspectives of the project.

3.4.2 Phase 1: One-on-one interviews

To collect data in phase one, semi-structured in-depth interviews were carried out with each firm's senior manager, marketing specialist, and three other colleagues who were integral to the marketing project. Alternatively, if the firm hired third-party specialists, they were asked to participate in this phase in place of one or two colleagues. By interviewing a variety of participants whose roles exist both within and external to the firm, the study answers some shortcomings and recommendations of previous research, including:

- The over-reliance on marketers self-reporting on their skills, abilities, and influence (Merlo et al., 2012).
- Senior management perspectives of the marketing function are preferable to the marketers' perspectives (Carson & Brown, 1994).

The one-on-one interviews with the respondents were flexible and encouraged participant conversation and interaction, with digital devices recording the participants' responses (Fontana & Frey, 2005; Peräkylä & Ruusuvuori, 2011). It was anticipated that by using a semi-structured approach, theoretical issues relating to marketing specialists' knowledge and their influence would be addressed and discussed. The interview questions were not provided to the participants before the interview. Moreover, a semi-structured approach meant that, beginning at more general questions, participants were then probed to establish paths and meanings important to the research. To ensure the relevant issues were covered, questions/probes from the interview topics sheet were created using Kruger and Casey (2000) interview outline; see Figure 3.4.2.

Figure 3.4.2: Interview topics sheet:

<p>Semi-structured interview question guide:</p> <ul style="list-style-type: none">• Opening questions – 2mins<ul style="list-style-type: none">○ Please tell me who you are, what you do; describe your firm, and how long have you been with your firm.• Introductory questions– 3mins<ul style="list-style-type: none">○ Before we discuss this project, let’s discuss your marketing specialist, who he/she is and how he/she came to work for you○ Please tell me about the project - its background and its purpose○ Please describe your role in the project• Transition questions – 5mins<ul style="list-style-type: none">○ How was [the marketing specialist] involved in the project?○ Apart from [the marketing specialist], tell me all those who helped with planning and developing the project? How did they help?• Key questions – 40mins<ul style="list-style-type: none">○ When putting the marketing project together, what kinds of skills did you see [the marketing specialist] employ?○ Which skills/background distinguish [the marketing specialist] from others?○ How important is [the marketing specialist’s] familiarity with your firm and industry? Why?○ What kind of changes did [your marketing specialist] introduce?○ How did [your marketing specialist] introduce these changes?○ With the right information, could a computer produce a project similar to yours? Why/ not?○ If a computer could not put a marketing project together, could non-marketing personnel or third-party marketing consultants do it instead? Why/not?○ How has [the marketing specialist] influenced your firm?<ul style="list-style-type: none">▪ How has [the marketing specialist’s] recommendations/actions affected outcomes?○ How are competitors, customers, others in the market responding to the project?• Ending questions<ul style="list-style-type: none">○ Overall, what distinguishes your [marketing specialist’s] knowledge from:<ul style="list-style-type: none">▪ Personnel within your firm?▪ Third-party consultants?○ Summary question – Interviewer provides a 2-3 minute summary of the discussion○ Did I correctly describe what was said?• The final question – ‘The purpose of this study is to investigate your marketing specialist’s knowledge and their influence with regard to a marketing project.<ul style="list-style-type: none">○ Is there anything we should have talked about but didn’t?

3.4.3 Phase 2: Focus groups

Phase two of the data collection used the focus group interview method to capture the perspectives of personnel, stakeholders, or shareholders who were directly influenced by the marketing project. The use of focus groups allowed participants to describe their experience of how the marketing specialists and their projects affected them both jointly and severally. Here,

the moderator was careful to elicit each participant's perspective of the marketing specialists' knowledge and influence and ratify their perspectives with the groups' overall impressions.

Focus groups have been likened to interviews for several reasons. The comparison is due to the facilitator's required attentiveness to responses of the group, being directional as well as probing in their inquiry, and inclusive to all in the group. The facilitator of focus groups is responsible to elicit, probe, challenge, and summarise participant views using their interview skills or via the interaction of participants.

Focus groups have several benefits. They can produce more data due to the larger participant base and in a comparatively shorter period of time and will complement the one-on-one interviews (Kamberelis & Dimitriadis, 2005). Focus groups generate data from dynamic interaction between participants, where individuals may spark deeper reflections from each other in the activities they were involved in (Rouleau & Balogun, 2011). The synergy generated in a focus group can provide the researcher rich insights into beliefs, opinions, and attitudes regarding the topic (Carey, 1994).

Focus groups also have their weaknesses. Care must be taken that members of the group do not dominate discussion, or members from a diverse background raise too many or inappropriate issues (Cavana, Delahaye, & Sekaran, 2001; Kitzinger, 1996). However, by describing their input and influence in a project, participants are providing a deep understanding of their context. Moreover, the focus group allows participants to discuss topics in a relational, sense-making activity of reflection and discussion. It is also important to acknowledge that the researcher is also engaged in the interview and focus group discussions and thereby co-constructs the narrative (cf. Rouleau & Balogun, 2011).

Focus groups lend themselves to research in this area as their purpose is to collect data from a focussed discussion in an effort to understand reality (Krueger, 1988). Patton (2002) believes the size of a focus group is largely irrelevant; instead, size depends on the inquiry's purpose and what is achievable with the available time and resources. The benefits of smaller groups include: being easier to manage (Morgan, 1996), more likely they will interact (Carey, 1994), and greater depth in answers. Whereas a larger group is more likely to provide a greater breadth of answers (Patton, 2002). A semi-structured focus group begins with an open primary question and relies on the facilitator's skills to manage the ongoing interview effectively. If the required topics have not been sufficiently addressed, the facilitator then introduces predetermined, content-based questions (Cavana et al., 2001).

3.4.3.1 Implementing focus groups for this research

As mentioned, the focus group data collection phase began after data from the firm's one-on-one interview phase were analysed. This phase consisted of a small focus group for each firm, made up of people who worked within or external to the firm. Participants included third-party

consultants, managers, channel and/or frontline staff, and salespeople, who were complicit in the marketing project but not involved in the one-on-one interviews. Because marketing specialists often collaborate with others to develop projects, this method allowed for data to be collected from a greater number of people at a given time.

As projects are usually social constructions (Klein, Biesenthal, & Dehlin, 2014), focus groups help ensure that each individual's perceptions are kept 'in-check' or validated by other participants. The objective of this phase was to gather perceptions from participants regarding the marketing specialists' role in the planning, developing, implementing, and appraising the project. Furthermore, these participants' perspectives contributed to evaluating the marketing specialists' influence on other marketing specialists, the firm, and the market. Also, participants were asked to describe how the marketing specialist knowledge was distinguished from the knowledge of non-marketers and third-party specialists. The focus groups were carried out face-to-face at a different location from the participants' firms, and were recorded using a digital recording device (Arksey & Knight, 1999; Bird, 2005; Kvale, 2007). To ensure the relevant issues were covered, questions and probes from the interview topics sheet were created using Kruger and Casey's (2000) interview protocols. See Figure 3.4.3a and b. Using the research's aims and predetermined knowledge domains as a guide, data collected from the focus groups were analysed using NVivo 11.

Figure 3.4.3a: Focus group topic list

1. To understand each respondent's involvement in the marketing project.
 2. To understand their perceptions on how, why and at what levels the marketing specialists were influential in the marketing project.
 3. In relation to the marketing project, to understand where the marketing specialist's knowledge provided was influential (within the marketing department, firm and with channels, customers, competitors, and others in the market).
 4. Anything else they would like to discuss?
- The response to these questions provided data regarding:
- The types of practices the marketers drew on during the project.
 - How and why these practices were influential.
 - Why and how these practices are distinguished from those of non-marketers and third-party specialists and considered valuable to respondents.

Figure 3.4.3b: Focus group question guide

- **Opening questions** – 2mins
 - Please tell me who you are, what you do; describe your firm, and how long have you been with your firm.
- **Introductory questions**– 3mins
 - In your own words, what was the background and purpose of your firm’s marketing project?
- **Transition questions** – 5mins
 - Who helped with planning and developing of this marketing project?
 - Think back to when the marketing project started; what were your first impressions?
- **Key questions** – 40mins
 - From your perspective, what did [your marketing specialist] need to know during the marketing project?
 - What do they need to do?
 - What do you feel the impact of the marketing project has been on you?
 - What effect did the marketing project have on competitors and consumers?
 - Finish this sentence, ‘This marketing project helped my firm by...’ Please explain.
- **Ending question**
 - All things considered, which aspects of [the marketing project] were the most important?
 - Summary question – I will provide a 2-3 minute summary of the discussion.
 - Did I correctly describe what was said?
 - The final question – provide a short overview of the purpose of the study
- Have we missed anything? Anything we should have talked about but didn’t?

After phase one and phase two were completed for each firm, the participants who attended interviews and focus groups numbered 38. This amount is beyond the 20 to 30 persons recommended by Creswell (1998, p. 113) in order to achieve “data in the theory”.

3.4.4 Phase 3: Marketing specialist’s reflections

Those calling for research investigating marketing specialists’ role at an actor-specific level have suggested the following methods to acquire data. Both Dibb et al., (2014) and Jaworski (2011) propose in-depth interviews with marketing managers about how they go about their work. Supplementing in-depth interviews, Dibb et al., (2014) further suggest that marketing managers keep a daily diary of their activities. Whereas Jaworski (2011) recommends an ethnographic approach, allowing for more observation-based insights rather than a self-reporting method. In this way, a rich perspective might be obtained when observing, recording, and analysing the marketing practitioner’s tasks in their natural setting (Jaworski, 2011). However, this research seeks to understand both marketing specialist knowledge and its influence. Therefore, it was decided that marketers could reflect on questions posed to them that required a depth of reflection not afforded in one-on-one interviews.

The third phase requires marketing specialists to provide a written reflection that addresses questions that arose during the data collection which required clarification. The purpose of this phase is to gain deeper insights into the knowledge and influence of marketing specialists. For instance, the ideation and decision-making processes the marketing specialists employed during their marketing projects needed further investigating. There are some reasons for returning to participants to gather more, or clarify existing data. Woodside (2010) argues that when a researcher meets a participant for the first time, i.e., during a one-on-one interview, one is meeting the person's 'representative' rather than the real person. Also, the one-on-one interview can be a challenging setting for marketing specialists to reflect deeply on everything they underwent during the project. Further, the reflective journal provides the marketing specialists time to iterate and reflect on the questions given; whereas the one-on-one interview can limit these processes.

To collect this data, each firm's marketing specialist was given a questionnaire in which they could journal their answers. This reflective journal had five statements or questions that arose during the data collection which, when answered by the marketing specialist, would provide further depth toward answering the research question (Clandinin & Connelly, 2000). This data collection method provided further information and insights they had not shared during the interview. As Polkinghorne (1983, p. 125) asserts, "The most exact and accessible form of expression is written linguistic expression... collected by the researcher in the form of personal... documents". The reflections journal questions are provided below. The responses to these questions provided rich data and consequently the journal responses are expressly identified in the analysis chapters.

Also in phase three, each marketing specialist was given a copy of the transcript from their phase one interview and asked to review it. As they reviewed the questions and their responses in the interview, the marketing specialist were asked to remember and describe key, in-depth thought processes they had not already discussed. Also, they were asked to address any inaccuracies and add this information to the transcript. In this way, the marketing specialist did not have to re-tell the story of their project, but provide further depth to the narrative they had already provided. By providing marketing specialists privacy and time to reflect on their answers, it was anticipated that rich, thick and insightful descriptions of their knowledge and its influence would be elicited (Clandinin & Connelly, 2000). See Figure 3.4.4. for the reflections journal questionnaire. It was hoped that the marketer's reflections would provide data regarding the identification of internal sources of specialist knowledge the marketer engaged to develop the project. Also, how marketers processed their specialist knowledge when developing a project and descriptions of the various types of influence the marketing specialist may have utilised.

Figure 3.4.4: Reflections journal for the marketing specialist:

Thank you for taking time to answer the following five questions to complete my research. Please type your answers into this Word doc. and return by email. A comprehensive account for each question would be very much appreciated. Please have your journal completed by May 31, 2015. Thanks again for the time you take completing this journal.

1. In our interview, you described several marketing tools that helped you develop your firm's project. You also mentioned information such as research about your market, your target audience, your resources, your firm and its strategy, and information you have garnered as a marketing specialist.
 - a. Would it be possible for a computer to be fed the same information and develop a marketing project which would go on to produce positive outcomes?
 - b. What if a competent non-marketer in your firm were assigned the same marketing project. Describe the likelihood of them developing and executing a successful marketing project?
2. As the marketing specialist, you introduced some changes to the way your organisation had operated prior to this marketing project. Please choose one change you implemented and describe how you addressed objections from stakeholders.
3. When developing a marketing project, some marketers described having 'light bulb' moments, 'bolts from the blue' or 'a blinding flash of light', where some aspect of the way forward becomes clear somehow. Can you recall a light bulb moment during a marketing project? If so, please provide details of the experience in its entirety, including the circumstances you were in, what you attribute the light bulb moment to, as well as responses and outcomes to it.
4. Someone commented that marketing is just 'one of the cogs' in their organisation. If this job/position was removed, what effect do you think it would have and where in the organisation would it have the most impact?
5. With hindsight, please list what you would have done differently for this project.

3.4.5 Phase 4: Documents and artefacts

The fourth phase of the research was the collection, examination, and analysis of documents and artefacts that were integral to the research questions (Bryman, 1992; Denzin & Lincoln, 2005; Sarantakos, 1993). Scholars report that managers' perceptions of their firms may be inaccurate, which will lead to erroneous results. Whereas supporting documents, or secondary data, might be used to incorporate realised, rather than intended, measures (Patwardhan, 2014). Firm documents were collected and analysed to further illuminate as well as validate participants' perceptions. Also, following examples of previous practice theory in marketing research (Fellelsson, 2011; Jaakkola, 2011; Järventie-Thesleff et al., 2011), documents and artefacts related to the generation, consumption, and resulting performance indicators were collected. These artefacts display a level of sophistication of thought, adoption of practices, and methods for measuring firm performance. In Creswell's (2008) view, one general guideline of qualitative research is not to study the sites and participants only, but to collect extensive detail about each site and participant. Therefore, along with the data analysed in the previous three phases, firm documents, project related records, photos, and advertisements were used in the thematic development of patterns and trends (Creswell, 2008). Supporting artefacts from the four firms

included, internal brochures, customer brochures, newspaper advertisements, marketing presentation handouts, company newsletters, an internal marketing CD, and research briefs. Also collected were emails between marketing agents and the marketing manager, printed marketing slideshows for internal customers, consultation papers, internal communications, market research findings, and consolidated briefs. These supporting documents provided data regarding the situation that caused their projects and information regarding their projects. Further details included their projects' scope, minutes, emails, presentations, preliminary sketches, advertisements, newspaper articles, promotion collateral and sales figures.

3.4.6 Summary of the data collected

In sum, data gathered from the four cases are made up of four phases. These methods are one-on-one interviews, focus groups, reflective journals, and the collection of artefacts relating to the firm and its marketing project. Data from the 20 one-on-one interviews, made up of five interviews per case, totalled 245,368 words or 28 hours 34 minutes of recordings, with an average 11,729 words or 1 hour and 22 minutes per interview. Data from the four focus groups totalled 65,877 words or 6 hours 35 minutes per recording, with an average of 16,469 words or 1 hour and 38 minutes per focus group. Data from the four marketing specialists' reflective journal entries, minus the questions, totalled 2,229 words, with an average of 575 words per journal.

3.5 Within-case analysis

Having discussed the collection of case data, the following section discusses the within-case analyses followed by a section discussing the cross-case analyses. First, an in-depth within-case analysis provides a description of each case and details the themes found within them (Creswell, 2012). Next, a cross-case analysis was performed where a thematic analysis across cases was conducted, and assertions or interpretations of the cases were given (Creswell, 2012; Perry, 1998). The cross-case analysis phase provides an aggregated and interpretive view of the lessons learned from the case studies (Creswell, 2012; Lincoln Y. S. & Guba, 1985). In light of the research questions, following the procedure of conducting both a within-case and a cross-case analysis is recommended to provide a comprehensive analysis of the collected data (Creswell, 2012; Yin, 2009).

Chapter 4 provides a within-case analysis, where each case's marketing specialist's knowledge and influence are discussed and analysed independently of the other cases. In this section, findings relating to how marketing specialists planned, developed, launched, and appraised their projects will be included in the marketing specialist knowledge domain categories. Likewise, findings related to the marketing specialist, firm, and market levels are presented to discuss the marketing specialist's influence in each case. While the findings of the marketing specialist's knowledge and influence of each case are presented independently, Chapter 4 concludes by summarising and comparing each case's findings with the others.

Along with describing each case, one of the primary purposes of a within-case analysis is to develop themes from each case (Creswell, 2012; Eisenhardt, 1989). Themes developed from the within-case analysis are then compared and contrasted with one another in order to scaffold themes that can be descriptive at a more general or overarching level. However, by identifying the knowledge domains of marketing specialists in the research's literature review, significant or overarching themes for this research had been addressed. In other words, the themes of marketing expertise, organisation familiarity, market intelligence, leadership, and life experiences had been determined a priori. The current marketing literature had not grouped marketing specialist knowledge domains in this way. However, it seemed unlikely for the marketing specialist knowledge discussed by those either in extant literature or participating in this research to escape the broadness and relevance of these categories.

To confirm the validity of the themes determined a priori, data related to marketing specialist knowledge were identified and then checked to see if they belonged in one of the five categories. As Table 3.5 shows, each case contains instances of the five categories of marketing specialists' knowledge, either at one or more of the levels under investigation. This process is described in further depth in the analysis sections that follow. In sum, important themes are often developed during the within-case analyses (Perry, 1998; Yin, 2009). However, as major themes were found beforehand and proved sturdy prior, during, and after the three analyses chapters, the conventional purpose for conducting a within-case analysis was superseded.

Table 3.5: Themes derived from the literature review and their occurrence in each case

Themes	Level	Tourism Bay			InterCity Group
		of Plenty	Zespri	Trustpower	
Marketing expertise	Marketing specialist	Yes	Yes	Yes	Yes
	Firm	Yes	Yes	Yes	Yes
	Market	Yes	Yes	Yes	Yes
Organisation familiarity	Marketing specialist	Yes	Yes	Yes	Yes
	Firm	Yes	Yes	Yes	Yes
	Market	No	No	No	No
Market Intelligence	Marketing specialist	Yes	Yes	Yes	Yes
	Firm	No	No	No	No
	Market	Yes	Yes	Yes	Yes
Leadership	Marketing specialist	No	No	No	No
	Firm	Yes	Yes	Yes	Yes
	Market	No	No	No	No
Life experiences	Marketing specialist	Yes	Yes	Yes	Yes
	Firm	Yes	Yes	Yes	Yes

Despite the themes concerning marketing specialist knowledge domains being determined a priori, other findings and themes relating to the marketing specialist knowledge and influence also emerged and are discussed. Also, the within-case analyses provided several benefits compared to providing the results solely on findings from cross-case studies. First, the reader can become familiar with each of the cases investigated (Creswell, 2009; Yin, 2009). In this way, the reader is introduced to explicit examples, instances, and interpretations of similarities and contrasts between cases (Eisenhardt, 1989; Yin, 2009). Therefore, rather than a brief background describing each firm, their personnel, and marketing project, detailed analyses are provided regarding each unit of analysis for each case. In sum, the within-case analyses provided a detailed account of each firm, allowing the researcher to identify issues and themes that were common among the cases (Creswell, 2012).

3.6 Cross-case analysis

Cross-case designs have increased in popularity in business studies for several reasons. First, the cross-case approach's purpose in aggregating the data of several cases and then comparing and contrasting their findings provide a set of defensible conclusions (Yin, 2009). Furthermore, the cross-case research design allows the researchers to distinguish between the common and the unique attributes of each case (Bryman & Bell, 2011). Subsequently, the replication of cross-case analysis upon several cases, compared to a single-case analysis, improves the likelihood of theory building (Bryman & Bell, 2011).

Despite its use de rigueur, one of the main reasons for using a cross-case analysis in this research is its compatibility with the practice theory approach prescribed in the research question. Specifically, practice theory's focus on the social and collective perspective of knowledge lends itself to an aggregated or amalgamated, as opposed to siloed, research design. Although practice theorists vary on whether one's knowledge and practices are inseparable (Tooman et al., 2016), they agree that one's practices exist in the collective or social rather than in the individualistic sense (Schatzki et al., 2001). Where other scientific fields count knowledge as something concrete, measurable, or codifiable; equating knowledge with information (Bloom, 1956; Tooman et al., 2016; Tsoukas, 1997), within a practice perspective, knowing "is a social process collectively accomplished" (Orr et al., 2016, p. 5). Consequently, practices, which are made up of understandings, procedures and engagements, are identified and discussed by analysing the data of each and all participants collectively. Hence practice theory seeks to connect the marketing specialists' common attributes of knowledge, which corresponds accordingly with the aggregating nature of cross-case analyses.

However, the aggregated approach of practice theory and cross-case analyses does not imply that the context of the practitioner is irrelevant. On the contrary, in practice theory knowledge is

connected to the knower and their context (Gourlay, 2006). For instance, although the firms in this research were separate entities, each of them shared a similar context. Specifically, their marketing practitioners were all experienced and were conducting a major marketing project for their firm. As this study's practice-based research question seeks social commonality regarding the knowledge and influence of the practitioners, the most suitable primary analysis method was a cross-case analysis.

To further illustrate, by conducting only a within-case analysis, the identity and substance of the marketing specialist's practices would have remained 'under the radar' before the cross-case analysis. The elusiveness of findings, called for using a practice-theory approach, would be due to the within-case analyses' lack of comparison between the shared knowledge and influences of the marketing specialists. Hence, once data from every case had been consolidated within their relevant knowledge domains and respective levels, only then the shared marketing specialists' practices were confidently categorised, named, and defined. This phenomenon aligns with Yin (2009) who asserts that cross-case analysis serves as a research synthesis or an aggregated findings approach.

Therefore, despite their positive characteristics, individual within-case analyses were an inadequate method with which to construct practice-based findings. The inadequacy of a within-case method should have been expected. According to Schatzki (2005, p. 480), although people "perform the action that compose a practice", that "practices are non-individualist phenomena", and it is the "open-ended set of actions that composes the practice". Therefore, due to the practice theory approach, the inclusion of participants' data from every case, proved the appropriate research design or methodology to analyse and interpret the data.

3.6.1 Naming of each case and the participants' roles

In Chapter 4, each of the firms or cases researched are named and described. Following on, each of these firms are then mixed in the cross-case analyses in Chapter 5 and Chapter 6. Using this approach, the roles and titles of each participant are given while protecting their identity. Firms are often anonymised in research for ethical reasons, whereas one of the reasons each firm accepted being a case is that they wanted to be acknowledged in doctoral research. While it is acceptable to name the firms involved, this research is ethically obliged to keep its participants' identities a secret, although not the participants' titles or roles. It should be noted here that the participant's title or position with the firm provides weight and perspective to the findings. To provide a chain of evidence, each response has been coded. These codes assist in connecting and facilitating the within-case analysis in Chapter 4 and the cross-case analyses in Chapter 5 and Chapter 6; see Table 3.6. For example, (C1:P1) refers to case one, participant one, or (C2:P2) refers to case two, participant two.

Table 3.6: List of evidentiary sources by pseudonym, title, case and participant

Tourism Bay of Plenty (C1)			
Jordan (I): board member (C1:P1).	Kelly (I): marketing consultant (C1:P2).	Carter (I & J): marketing specialist. (C1:P3).	Kelsey (I): senior manager. (C1:P4).
Parker (I): marketing consultant. (C1:P5).	Kennedy (F): Tourism operator (C1:P6).	Florian (F): Tourism operator (C1:P7).	Perry (F): Tourism operator (C1:P8).
Trustpower (C2)			
Logan (I): marketing consultant (C3:P1).	Tristan (I): senior manager (C3:P2).	Piper (I & J): marketing specialist (C3:P3).	Corey (I): senior manager (C3:P4).
Lane (I): marketing consultant (C3:P5).	Riley (F): marketing executive (C3:P6).	Mason (F): sales manager (C3:P7).	Haiden (F): digital channel manager (C3:P8).
Carson (F): administrator (C3:P9).	Andy (F): service delivery manager (C3:P10).		
Zespri (C3)			
Peyton (I & J): marketing specialist (C2:P1).	Taylor (I): marketing specialist (C2:P2).	Rowan (I): projects manager (C2:P3).	Drew (I): marketing consultant (C2:P4).
Emerson (I): frontline manager (C2:P5).	Jade (F): Kiwifruit grower (C2:P6).	Orion (F): Kiwifruit grower (C2:P7).	Tyne (F): Kiwifruit grower (C2:P8).
The InterCity Group (C4)			
Casey (I & J): marketing specialist (C4:P1).	Jesse (I): senior manager (C4:P2).	Cameron (I): senior manager (C4:P3).	Hadley (F): marketing executive (C4:P4).
Lonnie (I): marketing consultant (C4:P5).	Marley (F): frontline manager (C4:P6).	Harper (I): board member (C4:P7).	Wynne (F): frontline manager (C4:P8).
Shane (F): frontline manager (C4:P9).	Madison (F): frontline manager (C4:P10).		

Data collected from (I) Interview; (F) Focus group; (J) Reflective journal.

To summarise, both within-case and cross-case analyses were employed in the research design. The within-case analyses served to justify the a priori themes of marketing specialist knowledge domains as well as compare and contrast the unique and shared attributes of each case. Alternatively, the cross-case analysis resulted in producing the collective and shared findings compatible with the practice theory approach. These findings were not only relevant to the practices of marketing specialists' knowledge, but of their consulting, thinking, and judgement-making practices as well. In sum, the above reasons justify the use of both within and cross-case

analysis as the primary analysis method, when researching marketing specialist knowledge using a practice theory approach.

3.7 Data coding and analysis

Data analysis carries the inference of transformation, where large amounts of raw data are distilled, interpreted, and retold using analytic procedures to produce clear, insightful, and trustworthy findings (Gibbs, 2007). The outcome of data analysis is the production of findings. These findings usually take the form of themes or categories summarised by a theory, model, or framework, that defensively address the evaluation of the research objectives and questions (Thomas, 2006). In this research, data analysis aimed to understand marketing specialists' knowledge and its influence through the experiences of the participants from the case studies. To ensure fidelity to this research's aim, questionnaires were purposely drafted to elicit the required information. As mentioned, deductive and inductive methods of analysis were used, which is common in case studies (Creswell, 2012).

Due to the practice theory nature of the research question, a different approach was used for the within-case analysis and the cross-case analysis. In the within-case analysis, NVivo 11 was used for each case to code data into the various predetermined nodes representing both marketing specialists' knowledge and marketing specialists' influence. Within the marketing specialist knowledge node, data was captured in separate nodes regarding instances of their knowledge being used when planning, developing, launching, and appraising their firm's project. Nodes were also created to collect data relating to the influence of the marketing specialists at specific levels, namely the marketing specialist, the firm, and the market place. Having sorted data into their relative nodes, quotes exemplifying the derived themes were selected and used in the descriptive analyses for each firm. The results of the within-case analysis for each firm are found in Chapter 4.

During the cross-case analysis process, data from the interviews, focus groups, the marketing specialists' reflections, and supporting documents underwent data organisation, theme development, and theme interpretation (Marshall & Rossman, 2011). Across each case, relevant data was first organised into each of the five a priori categories: marketing expertise, organisation familiarity, market intelligence, leadership, and life experiences, to undergo thematic analysis. Thematic analysis is a process by which qualitative data is encoded, so that the volume of data elicited from each case may be systematically clarified, analysed, interpreted, and presented (Boyatzis, 1998; Marshall & Rossman, 2011). Themes emerged from such instances as repetitions in the data, unfamiliar terms or categories, theory related material, similarities and differences in accounts, and even missing data (Glaser & Strauss, 1967; Ryan & Bernard, 2003). Further themes were also developed by identifying similarities between theory and data (Langley, 1999). Previous literature based on survey data provided useful findings that highlight ways marketing departments might perform if they want to be influential. These

findings provided some direction in how marketing specialists may also be influential. However, the practice approach can provide a theory to illustrate why and how practitioners do things, thereby developing themes of practices from a marketing specialist's perspective rather than the researcher's. In this way, the practice approach aims to present cogent findings applicable to the research question (Bourdieu, 1998; Sandberg & Tsoukas, 2011).

Overall, the cross-case analysis was conducted in the following way. A deductive coding process categorised relevant data into their relevant knowledge domain. Second, inductive coding determined the practice-based themes and descriptions of this data, as well as the data that fell outside the knowledge domain categories. Third, a further deductive process was used to determine the procedures, understandings, and engagements of each of the marketing specialists' practices that emerged. Finally, inductive coding was used to analyse various aspects of the marketing specialists' influence.

3.7.1 Deductive coding

The cross-case analysis phase employed several steps. First, the five major knowledge domains of marketing specialist knowledge derived from an analysis of extant literature became the primary coding categories. Identifying dimensions or constructs from the literature is a tactic suggested by Eisenhardt (1989). Accordingly, data from the transcripts of each case were allocated deductively to the pre-specified knowledge domains. The categories of knowledge domains were purposely broad and distinct; however, the researcher was open to change, to add or remove categories should the analysis of data require it.

To assist in checking the fidelity between the predetermined marketing specialists' practices and the data collected, a code description sheet was developed; see Table 3.7a. After this phase of the data analysis was completed, the above predetermined categories of marketing specialist knowledge remained unaffected. These categories served as a basis to examine various sub-themes that constitute marketing specialist knowledge, which was generated inductively via cross-case analysis. Therefore, the code description checklist served to ensure the correct categorisation of data.

Table 3.7a: Code description sheet for marketing specialist knowledge

Label	Definition	Description	Description of any qualification	Examples from case data
Marketing expertise	Practices shared among marketing specialists that are responsible for the development, implementation, and/ or control of marketing solutions, strategies, and policies.	Technical knowledge Process knowledge Explanatory knowledge	Where marketing specialists have specific, detailed knowledge of models, theories, operations, laws, or whatever may be influential in their field.	‘When you bring in an expert it’s about getting the pointy end, so someone that can bring in practical, experiential knowledge’ -Board member.
Organisation familiarity	Practices that capture the particularities of the commercial environment the marketing specialist finds themselves in.	The marketing specialist’s knowledge of the firm, its personnel, structure, culture, industry, stakeholders, and strategic intent.	Data where marketing specialists relate to the industry, relationships with other personnel, and personal investment in the firm.	‘I was external to the organisation, so I needed to get to know everyone and their own views’ –Marketing specialist.
Market intelligence	Formal and informal knowledge of current and anticipated market perceptions and needs as well as competitor activities.	Information on market activity.	In-house research, target audience, stakeholders, competitors, and third-party researchers.	‘We want to discover, and these are the people we would like to hear from, and this is what we want to test with them’ – Marketing specialist.
Leadership	A process whereby an individual influences others to achieve a common goal.	A display or expectation to demonstrate leadership qualities in a variety of contexts.	Implement marketing strategy, motivate, facilitate, monitor, and nurture others.	‘I was so conscious that you can’t lead people to the answer that you want, or the answer that you think is right. I was conscious of that on so many occasions.’ – Marketing specialist.
Life experiences	Ways of understanding how things and people are linked; it engages one emotionally and helps facilitate a collective understanding of others and oneself.	Personal experiences, abilities, and values injected into shaping the project.	Personal talents, experiences and non-marketing-based skills, training, or ideas.	You bring all your experience of not only advertising, but of life and people and human interaction and the world, and you bring that knowledge to a task. –Marketing specialist.

3.7.2 Inductive coding

While the main categories of marketing specialist knowledge were developed deductively, findings regarding the practices marketing specialists carried with them were derived inductively. Sub-themes of marketing specialist knowledge domains (Chapter 5.1.1 to 5.1.5), as well as how, why, and where marketing specialists were influential (Chapter 6), were developed using inductive analysis. Here, themes, categories, and patterns were derived from iterative readings and exploration of the data (Janesick, 1994). Hence the themes, categories, and patterns for these topics were constructed from reviewing the data provided, rather than being predetermined (Boyatzis, 1998).

To illustrate, Table 3.7b shows how exemplary quotes relating to a specific knowledge domain were distributed at their appropriate level, whether the marketing specialist, firm, or market. By implementing an analysis approach advanced by practice theorists (Schatzki, 1996), the analysis in Chapter 5 breaks down these instances of marketing specialist knowledge inductively into further categories. These categories are identified as the practices of marketing specialists. Hence Chapter 5.1, discusses the practices and how they are constituted, rather than identify and code the specific knowledge types of marketing specialists identified in previous studies. For example, previous marketing literature discusses marketing managers' knowledge of product and brand management, strategic planning, or communication and promotion (cf. Gray et al., 2007).

In contrast, practices often take the form of gerunds, the –ing form of a verb when used to form a noun phrase. For example, the marketing specialists' practices of **Anchoring** and **Ingraining** were found inductively within the organisation familiarity knowledge domain. Therefore, by using a practice approach, this study avoided creating just another list of codified marketing skills and knowledge identified by a researcher or recommended by marketers and their employers. Instead, this research examines how and why marketing specialists use knowledge, theirs and others, and how this practice is influential at the department, firm, and market levels.

Table 3.7b: Number of cross-case raw data instances of marketing specialist knowledge at each level

Knowledge domain and definition:	Level:	TBOP	Zespri	Trustpower	InterCity Group
Marketing expertise Knowledge regarding the development, implementation, and/ or control of marketing solutions, strategies, and policies.	Marketing specialist	2 quotes (127 words)	4 quotes (533 words)	4 quotes (459 words)	8 quotes (732 words)
	Firm	1 quote (11 words)	7 quotes (483 words)	3 quotes (499 words)	8 quotes (875 words)
	Market	4 quotes (292 words)	2 quotes (197 words)	4 quotes (243 words)	7 quotes (1,156 words)
Organisation familiarity Knowledge of the firm's personnel, branding, structure, culture, stakeholders, resources, capabilities, strategic intent, identity, products, offerings, and commercial setting.	Marketing specialist	3 quotes (186 words)	4 quotes (467 words)	7 quotes (423 words)	7 quotes (1083 words)
	Firm	4 quotes (224 words)	6 quotes (465 words)	3 quotes (220 words)	6 quotes (686 words)
Market intelligence Formal and informal knowledge of current and anticipated market perceptions and needs as well as competitor activities.	Marketing specialist	4 quotes (161 words)	7 quotes (604 words)	4 quotes (356 words)	2 quotes (597 words)
	Market	3 quotes (195 words)	4 quotes (655 words)	5 quotes (477 words)	5 quotes (990 words)
Leadership A process whereby an individual influences others to achieve a common goal.	Firm	4 quotes (243 words)	12 quotes (1172 words)	7 quotes (680 words)	10 quotes (1287 words)
Life experiences Composed of one's values, personal skills, training, and talents which help with ways of understanding how things and people are linked.	Marketing specialist	4 quotes (259 words)	4 quotes (168 words)	2 quotes (332 words)	3 quotes (88 words)
	Firm	2 quotes (122 words)	2 quotes (56 words)	3 quotes (434 words)	6 quotes (653 words)
	Market	1 quote (85 words)	1 quote (133 words)	11 quotes (981 words)	1 quote (126 words)

The analyses process involved browsing, highlighting, coding, grouping and labelling, developing themes or categories, checking for consistency and resonance, selecting examples, and reporting findings (Mutch, 2005). In order to reliably fulfil the research's objectives, topics relating to the marketing specialists' influence were developed after data had been collected. During the inductive analysis, rather than developing code sheets, data that appeared to be related was congregated and re-congregated until clear categories began to form.

Consequently, many of the themes and categories were developed using the same words used by the participant. For instance, Marketing specialists' judgement was a phrase used by one firm's senior manager. This term was then defined using a dictionary, albeit slightly altered to describe its use by a marketing specialist. Insightfulness, however, is a term previously used in marketing literature (Schilling, 2005). Insightfulness became a theme as it readily captured the meaning of the data relating to how marketing specialists cognitively linked previously disparate ideas or knowledge domains.

Apart from using the participant's own words and terms from marketing theory, the analysing process was also aided by categorising data into the relevant praxes used by marketing specialists. Their praxes were determined by instances of marketing specialists being influential at specific levels; namely the marketing specialist, the firm, and market. This process was a matter of congregating marketing specialist activities at each of these levels and labelling them. In sum, in vivo codes, management terms, the division of contexts or levels the marketing specialists operated in, and the subsequent sub-coding of main themes guided the coding process (Miles, Huberman, & Saldana, 2014).

3.7.3 Further deductive analysis

Once the practices of marketing specialist knowledge domains had been categorised and named inductively, each of these practices was further deconstructed deductively. This deductive process was aided by a practice theory approach of categorising each practice's constituent procedures, understandings, and engagements. First, procedures are defined as explicit rules, principles and precepts, which are summed up as 'know-what'. Following on, understandings are defined as knowledge of what to say and do, or 'know-how'. Third, engagements link the means and moods that govern what makes sense to go beyond the procedures and understandings. Here, each of the three constituents of each of the marketing specialists' practices, were distilled deductively using cross-case data. This deductive process culminated in a clear description of each of the marketing specialists' practices in Chapter 5. In sum, suitable titles and descriptions of each practice were arrived at by identified and categorised practices within marketing specialists' knowledge domains. Furthermore, each practice's procedures, understandings and engagements were identified and categorised using both deductive and inductive methods.

3.8 Approaches to trustworthiness of data

Case studies which seek to represent an investigation in a reliable manner follow protocols to ensure construct validity, internal validity, external validity, and reliability (Beverland & Lindgreen, 2010; Yin, 2009). For a summary of the quality assurance protocols, see Table 3.8.

Beverland and Lindgreen (2010, p. 6) argue that three practices are required to ensure research quality for case studies. These practices include the provision and details of the researcher's epistemological position, which is provided in Chapter 3.1; details on the case study methods, provided in Chapter 3.3 to 3.7; as well as details on the quality assurance practices (Beverland & Lindgreen, 2010). These quality assurance practices include the case study method's construct validity, internal validity, and external validity, as well as reliability (Beverland & Lindgreen, 2010; Yin, 2009), which are provided here.

3.8.1 Construct validity

Construct validity relates to the case study's objectivity (Yin, 2009), in that the theory developed by data analysis makes sense to third parties as well as the researcher (Marshall & Rossman, 2011). To maintain the construct validity in this research, multiple sources of evidence were used, such as interviews, focus groups, reflective journals, and the collection of marketing project artefacts. Also, a chain of evidence was created so that others may certify that the data from the transcripts, documents, and other artefacts justify the findings and conclusions of the study. Furthermore, participants were asked to review their transcripts in order to confirm their accuracy; marketing specialists were later presented with the findings to confirm their accuracy.

3.8.2 Internal validity

Internal validity is concerned with providing findings in explanatory case studies that demonstrate a causal relationship (Yin, 2009). By ensuring internal validity, the researcher is safeguarding against selective perception (Krueger & Casey, 2000). To apply internal validity to the deductive analysis undertaken, the managerial and marketing literature reviewed suggested that marketing specialist knowledge could be catalogued under several domains. The domains that emerged were marketing expertise, organisation familiarity, market intelligence, leadership, and life experiences. Data collected from participants demonstrated a clear correlation with these themes. Concerning the inductive analysis used, data from across cases are used to justify the categories and themes the researcher developed. These data/findings correlations prove causal relationships which in turn provides internal validity (Yin, 2009).

3.8.3 External validity

External validity tests whether this research's findings are generalisable beyond the case studies examined (Yin, 2009). As this research used a multiple case study method, replication logic may be used in supporting the findings' trans-contextuality (Yin, 2009). For instance, findings

and sub-themes from the cross-case analysis may provide the reader confidence in their applicability to similar contexts rather than the specific contexts from which they emerged. As discussed, heterogeneous cases were purposively selected in order to develop findings that were more likely to be applicable across contexts where marketing specialists develop and launch marketing projects. Moreover, another test of external validity was that findings were congruent with current marketing influence, management, and leadership theory (Yin, 2009).

3.8.4 Reliability

A key protocol in quality assurance is reliability. Reliability is where the research question is clear, and the case study's procedures are detailed and transparent to enable others to replicate the study and come to the same conclusions (Yin, 2009). As intimated, reliability aims to minimise the researcher error and bias (Yin, 2009). To achieve reliability, case study protocols, such as the questionnaires and a database of the cases examined have been provided.

Table 3.8: Data trustworthiness processes

Protocols:	Theoretical explanation of the concept	Operationalised through
Construct validity	The methods used accurately reflect and reproduce what is being investigated	<ul style="list-style-type: none"> • Multiple sources of evidence: one-on-one interviews, focus groups, journal entries, supporting documents • Chain of evidence supplied using quotes from participants and artefacts from marketing projects • Participant reviewed the transcript and findings
Internal validity	Providing findings that demonstrate causal relationships	<ul style="list-style-type: none"> • Explanation building using cross-case analysis • The marketing specialist practices identified in the marketing influence literature paralleled the data collected • Findings from the marketing influence data paralleled theories from leadership and power literature • Rival explanations were used where disconfirming evidence refined categories and codes toward their final state
External validity	Tests whether or not the findings are generalisable beyond the cases investigated	<ul style="list-style-type: none"> • The study specifies the population being researched, thus specifies the limits on the contexts where the findings can be applied • Use of replication logic in multiple case studies
Reliability	The research question is clear, and the case study's procedures are detailed and transparent enough for other researchers to replicate and arrive at the same conclusions	<ul style="list-style-type: none"> • The research question is provided • Standardised interview protocols are provided • Case study procedures are provided • Case study descriptions are provided

Adapted from Beverland and Lindgreen (2010) and Yin (2009).

3.9 Ethical considerations

Further to the integrity afforded by the procedures above, ethical considerations were also taken into account throughout the research process. Hence, ethical measures and considerations were both purposely and constitutionally embedded within the research process. For instance, construct validity, internal validity, external validity, and reliability assist in the quality assurance of a study (Yin, 2009) as indeed do the epistemological and theoretical perspectives discussed earlier (Mason, 2002). In other words, accurate and fair treatment of the participants' information, as well as their time, were ethical, moral, and central considerations of this research. Furthermore, ethical protocols were established and maintained to protect the participants and their firms from adverse consequences that may arise from their participation in the research. A copy of the University Ethics committee's approval letter is provided in Appendix 1.5.

Ethical considerations are critical in qualitative research because of the particular occurrences this kind of research invokes (Mason, 1996). First, qualitative research obliges the researcher to carefully consider the confidentiality and rights of participants and the time they give. Second, the researcher is obliged to both do no harm to the participant, as well as use their input into creating research that is of benefit to others (Gibbs, 2007). Second, to assist in producing ethical and reliable results, participants were sent their transcripts to check for both authenticity and commercially sensitive data which may need to be withdrawn. Also, after the analysis phase, the marketing specialists or a senior manager from each case, subject to availability, were provided feedback on the findings to check for agreement.

Within the above procedures are some critical ethical protocols. Before being interviewed, each participant was given an information sheet regarding the nature of the research and their obligations and rights. For instance, participants were informed that participation was on a voluntary basis and that they could withdraw at any time during the data collection process. Also before the interview, participants were required to sign a consent form. As part of the researcher's duty of care, transcribers were required to sign a confidentiality agreement, and the participants' identities have been kept confidential from unauthorised people. However, while the participants' identities are confidential, each of the cases agreed to be named; hence firms and their marketing projects are identified in the cases' outlines in Chapter 4.1. To overcome the potential for participants to be identified, any reference to firms, participants, or the specific marketing project has been substituted with generic terms in the cross-case analyses. These generic terms include "senior manager", "marketing specialist", "board member" and "frontline staff". Fortunately, this contingency still left the data intact and comprehensible to answer the research question.

3.10 Summary

This chapter's objective was to document the onto-epistemological position and methodological protocols undertaken in this research in order for the reader to judge the study's credibility, findings, and transferability. Here, details relating to the research design, selection of participants, and ethical considerations were provided. This chapter precedes the research analysis chapters in order to provide confidence in the following analyses and findings.

Specifically, Chapter 4 provides a within-case analysis overview of each of the four firms, with the in-depth analyses of the four cases discussed in Appendix 2. For each case, findings regarding marketing specialist knowledge and marketing specialist influence are described and analysed. More specifically, within the marketing knowledge section are findings related to how marketing specialists planned, developed, launched, and appraised their projects. Also, findings related to the marketing specialists' influence at the marketing specialist, firm, and market levels are presented. Chapter 5 discusses the practices related to marketing specialist knowledge identified across the cases. Specifically, Chapter 5.1 discusses the five marketing specialist knowledge domains identified in the literature review. Moreover, this section discusses the practices that constitute these knowledge domains, followed by Ch 5.2 to 5.4 which discusses the consulting, thinking, and judgement-making practices that emerged.

Chapter 6 discusses the marketing specialists' influence. Specifically, Chapter 6.1 to 6.4 describes how various praxes of marketing specialists were influential at the marketing specialist, firm, and market levels. Then, Chapter 6.6 provides a reflective summary of marketing specialists' influence on the marketing specialists, the firm, and the market. Throughout each section, direct quotes of participants, from interviews, focus groups, and the marketing specialist's reflective journal are used to justify the analyses as well as bring it to life. Therefore, the onto-epistemological lens, methodological approaches, and ethical practices discussed above, served to guide and justify this study's credibility, findings, and transferability.

Chapter 4 Within-case analysis

4.0 Introduction

Using both this chapter and Appendix 2, the analysis and discussion focus on the knowledge marketing specialists used when planning, developing, implementing and appraising their respective marketing project's settings. To clarify, the term 'project's settings' was used by several marketing specialists to describe the adjustable components of each offering's marketing mix. These settings might include a brand's tagline, a product's price point or livery colour, or a specific product feature. The projects' settings were developed by applying cogent marketing tools, principles, and data along with the firm's context, objectives, and resources. Overall, this chapter provides a description and analysis of each case before the cross-case analysis in the following two chapters.

The four cases are introduced in Chapter four, and each cases' in-depth analysis and discussion is presented in Appendix 2. Each of the four cases represents a firm: First, Tourism Bay of Plenty is a regional tourism organisation which supports operators and visitors associated with New Zealand's tourism industry. Second, Zespri is a horticultural company who operate a single-desk marketing system to export kiwifruit grown throughout New Zealand to multiple international markets. Next, Trustpower is an energy and telecommunications retailer who supply power, broadband, phone, and gas utilities. Fourth, the InterCity Group is a national passenger transport primarily associated with a bus service network although they also provide multiple tourism experience offerings. Each of these firms had developed and launched a marketing campaign before being approached to participate in this research. For further reference, artefacts from each of these marketing projects are provided in Appendix 3. Multiple interviews with marketing and non-marketing participants were conducted to understand marketing specialists' knowledge and influence. This approach allowed the perspectives of those hierarchically higher, equal, and lower than the marketing specialists, as well as third-party stakeholders, to be analysed (see Table 4.0). The data collected consisted of 20 one-on-one interviews, four focus groups, and four marketing managers' reflective journals, as well as artefacts from each marketing project. The interviews and focus groups were audio recorded, transcribed and analysed along with the reflective journals and artefacts.

Table 4.0: List of cases and participants

Case	Summary of case and marketing project	Participants' pseudonyms, role, code
Tourism Bay of Plenty	a regional tourism organisation which supports operators and visitors associated with New Zealand's tourism industry	Jordan: board member (C1:P1) Kelly: marketing consultant (C1:P2) Carter: marketing specialist (C1:P3). Kelsey: senior manager (C1:P4) Parker: marketing consultant (C1:P5) Kennedy: Tourism operator (C1:P6) Florian: Tourism operator (C1:P7)
Zespri	a horticultural company who operate a single-desk marketing system to export kiwifruit grown throughout New Zealand to multiple international markets	Peyton: marketing specialist (C2:P1) Taylor: marketing specialist (C2:P2) Rowan: projects manager (C2:P3) Drew: marketing consultant (C2:P4) Emerson: frontline manager (C2:P5) Jade: Kiwifruit grower (C2:P6) Orion: Kiwifruit grower (C2:P7) Tyne: Kiwifruit grower (C2:P8)
Trustpower	an energy and telecommunications retailer who supply power, broadband, phone, and gas utilities	Logan: marketing consultant (C3:P1) Tristan: senior manager (C3:P2) Piper: marketing specialist (C3:P3) Corey: senior manager (C3:P4) Lane: marketing consultant (C3:P5) Riley: marketing executive (C3:P6) Mason: sales manager (C3:P7) Hayden: digital channel manager (C3:P8) Carson: administrator (C3:P9) Andy: service delivery manager (C3:P10)
The InterCity Group	a national passenger transport primarily associated with a bus service network although they also provide multiple tourism experience offerings	Casey: marketing specialist (C4:P1) Jesse: senior manager (C4:P2) Cameron: senior manager (C4:P3) Hadley: marketing executive (C4:P4) Lonnie: marketing consultant (C4:P5) Marley: frontline manager (C4:P6) Harper: board member (C4:P7) Wynne: frontline manager (C4:P8) Shane: frontline manager (C4:P9) Madison: frontline manager (C4:P10)

While each case employed a marketing manager, several other marketing specialists were involved in each of the projects. Subsequently, data relating to experienced marketers are considered relevant to findings on marketing specialist knowledge and influence.

Along with the knowledge and influence of marketing specialists, the firm they worked for was also taken into consideration as it provides the context in which the project was carried out. In each case, the planning, developing, implementing, and appraising of each project, are correlated to the firm's disposition, i.e., their objectives, restrictions, and risk tolerances. Due to the influence of context, it is vital that both the marketing specialists' knowledge and their firm's disposition are considered throughout the analysis of each case. Therefore, each case analysis

describes how marketing specialist knowledge contributed jointly and severally to each project. In this within-case chapter, each case is discussed in light of the following topics:

- The firm's and project's background
- List of evidentiary sources
- RQ1: How was marketing specialists' knowledge used when:
 - Planning
 - Developing
 - Implementing
 - and Appraising their marketing project?
- RQ2: How and why were they influential at the:
 - Marketing specialist
 - Firm
 - and Market levels?
- Summary

In brief, Chapter 4 provides a within-case analysis of each firm which serves four main purposes. First, it introduces the reader to each firm and its project. Second, the reader is familiarised with the evidence the participants provide in each case regarding the marketing specialists' knowledge and influence. Next, the research's questions are analysed and discussed in light of the evidence provided on a case-by-case basis. Finally, the results of each case are summarised.

4.1 Tourism Bay of Plenty's project

Tourism Bay of Plenty (TBOP) is a regional tourism organisation which markets the Bay of Plenty, a popular tourist destination in New Zealand to visitors both domestically and internationally. The Bay of Plenty region contains beach, island, and event attractions as well as a wide range of retail, accommodation, and activity offerings. TBOP's rebranding project was developed in response to an environmental disaster and aimed to attract visitors back to the region. As the environmental damage subsided, TBOP decided to develop and launch a marketing campaign to open the region to tourism again. Essentially a rebranding project, the campaign's purpose was to increase visitor bed nights, and average visitor spend and attract and support local tourism business.

To begin the rebranding process, TBOP's marketing specialists, including their marketing manager and external consultants, used a Brand Roadmap method to determine the 'brand essence' of the region. From the brand essence, taglines and visual representations for the campaign were developed and tested on and approved by target audiences. This approach had two major benefits. First, it provided a process which leaned on the teamwork and experience of marketing specialists, avoiding difficult-to-answer market research questionnaires and mitigating the personal opinion of stakeholders. Second, for both TBOP and tourism operators who wished to align with the rebranding message, the rebrand provided a basis for consistent

marketing messaging in at least the medium term. The brand essence, themed as 'laidback/sophistication', systematised TBOP marketing projects by providing a clear current and an aspirational substructure for aligning their marketing collateral. For instance, photography, print and design media were not appraised on their artistry or professional quality only, but on their cogency to the Bay of Plenty's brand essence. TBOP considered the marketing project a success due to a significant increase in tourism volume indicators in the area since its launch (Bay of Plenty Times, 2015b, 2015a). Therefore, as best as TBOP could determine using available market data, the campaign met the objectives around increased bed nights and visitor spending. Moreover, TBOB achieved two other objectives by launching a compelling and unified identity for the region and strengthening its reputation as an enabler of new tourism attractions and events.

4.2 Zespri's Taste Review project

Based in the Bay of Plenty, New Zealand, Zespri, is the world's largest marketer of kiwifruit, exporting to over 53 countries with a turnover in 2014 of NZD\$1.56 billion (Zespri, 2015b). Zespri is a single-desk marketing organisation with over 2,500 New Zealand growers and has a network of regional sales and marketing offices in Europe, Japan, China, Singapore, South Korea, and Taiwan (Zespri, 2015c). Zespri's mission statement is, "To be the acknowledged world leader in kiwifruit and the retail category leader" (Zespri, 2015c, p. 2) and has identified several growth levers to achieve their objective, the top two being taste and quality, and health (Zespri, 2015c). Based on research conducted in Japan in 2004, Zespri had established a positive correlation between the amount of dry matter in kiwifruit and consumer liking. Consequently, Zespri proposed that a minimum taste standard is imposed upon kiwifruit to reduce the likelihood of exporting a dissatisfying product. The 2014 sensory research, which took place across five countries with 1,275 respondents, found that the current taste settings, based on a percentage of the fruit's dry matter, were too low. This finding meant the minimum taste standard needed to be raised, potentially reducing the amount of kiwifruit Zespri would accept from growers (Zespri, 2015a).

Proposing an increase in dry matter in kiwifruit to growers has its challenges; there are many external factors, such as climate, pestilence, and their region's attributes and conditions which directly affect the dry matter content of kiwifruit. To mitigate these and other factors, Zespri and its growers and other stakeholders have produced crop management techniques to help manage taste levels. For instance, reducing crop volume increases dry matter levels for green kiwifruit, whereas gold kiwifruit responds to canopy management techniques such as pruning and girdling. These and other techniques assist growers in raising their fruit's taste levels.

Growers often express concerns about these techniques, as reducing the numbers of green kiwifruit produced will impact on volumes and potential profit. Moreover, growers are sceptical

on how the minimum taste levels are measured due to the small number of fruit tested and the knowledge that dry matter levels may fluctuate on given days or with various fruit testing contractors. The incentive payment system also has challenges. For instance, profits can be impacted by many external factors such as foreign exchange, competitor moves, and fluctuating market prices. Despite growers acknowledging the necessity of consumer satisfaction for their industry, these concerns have provided growers reasons to resist change. However, market sensory research conducted in 2014 in five of Zespri's key international markets strongly suggested that consumer preferences were somewhat higher than Zespri's current standards.

Launching the 2015 Taste Review, Zespri aimed to drive grower behaviour toward producing better tasting fruit and better grower returns (Zespri, 2015c). Having determined a higher minimum taste standard was needed to satisfy customer liking of kiwifruit globally, Zespri approached growers with a proposal to incentivise them to grow their fruit with a higher dry matter content. The campaign consisted of roadshows around New Zealand's kiwifruit regions, disseminating their 2014 research findings for growers who were subscribed to their website, as well as grower liaison and other communication initiatives. The proposal also outlined how the new levels impacted the Taste Zespri Grade payment. The Taste Zespri Grade payment is calculated from a sample of 90 fruit from each maturity area (a defined block with fruit maturing at a similar rate) of an orchard. The payment system determined the payment for fruit whose dry matter content reached the minimum standards and higher prior to harvesting (Zespri, 2015a). Also introduced was a payment threshold at a higher level of dry matter, as consumer liking stopped at a certain level of sweetness (Zespri, 2015c). As mentioned, kiwifruit that did not reach the minimum standard would not be accepted for export.

As an internal marketing campaign, much of the marketing specialists' work was done pre-launch. Although growers understood that consistently good tasting kiwifruit would protect their brand, Zespri expected and prepared for pushback to their proposal due to its potential impact on grower profits (e.g., Taste Review Committee, 2015). To mitigate pushback, marketing specialists had to provide sufficient evidence convincing growers that robust processes were undergirding the 2015 Taste Review. Therefore, the Roadshow and subsequent marketing communications emphasised the research components, amounting to 25 studies in five countries with 14,000 respondents, the analysis, findings, and recommendations processes. Marketing communications also described how Zespri's board and management, Plant & Food Research, marketing consultants, academics and laboratories, orchard liaison managers, as well as experts from other industries were involved in developing the Review. Moreover, the communications described the availability of technical support that growers may require to lift the taste levels of their kiwifruit. Accordingly, these communications were designed to convince growers that the new settings would assist Zespri in sustaining both their premium product and their growers' profits.

In sum, to export consistently better tasting kiwifruit into its global market and retain its premium price and branding, Zespri's marketing team launched the 2015 Taste Review. Consisting of consumer liking research, monetary incentives, and grower support initiatives, the review serves to change the behaviour of its 2,700 growers into producing consistently sweeter kiwifruit. Although the roadshow and various marketing communication channels are the face of the 2015 Taste Review, marketing specialists and various industry, academic, and cross-industry stakeholders planned, developed, and launched the initiative.

4.3 Trustpower's rebrand and new product launch

Trustpower is a publicly-owned New Zealand Stock Exchange company which generates electricity and retails energy and telecommunication services; specifically, electricity, gas, phone, and broadband (Trustpower, 2015a). Trustpower's 2014 figures, which predate their 2015 marketing project, show Trustpower provides around 239,000 electricity connections, 23,000 gas connections, 36,000 telecommunication connections, with around 50,000 customers receiving two or more services. As of 2015, Trustpower has 628 full-time employees throughout New Zealand and Australia, with 65% of employees based in Tauranga, New Zealand (Trustpower, 2015b, p. 12).

While Trustpower has a marketing department, which includes a marketing manager and marketing advisor, it did not have a traditional marketing team structure. Instead, Trustpower had several market-focused departments containing specialists whose combined knowledge contributed to marketing projects and campaigns. The Markets team, which is overseen by the general manager, is responsible for supervising teams who are focused on Trustpower's marketing. The teams involved primarily in the marketing projects being investigated were Insights, Propositions, Pricing and Marketing. The Insights manager was responsible for sensing and understanding Trustpower's market and its trends and behaviours. For instance, by conducting customer research and analysing its customers' data, Insights found a correlation between churn and the number of utilities customers had. Next, the Propositions team, who understood Trustpower's various utilities, regions of operations, and each region's competitive market, took Insights' findings and developed products ideas that would attract and retain customers. Following on, Pricing considers and works with the margins and viability of the Proposition department's product ideas. Once a product is approved, in this case, the \$49 power and broadband offer, it is passed to Marketing who are charged with developing a promotional campaign.

The marketing campaigns being investigated were developed based on findings of Trustpower's customer behaviours, as well as recognising the need to both modernise and consolidate their branding. Regarding their customers' behaviour, Trustpower's Insights department recognised that churn rates of their customers with two or more utilities were significantly lower than

customers using only one. In other words, customers who only bought power were more likely to move to a competitor than those who had both power and phone accounts. These findings provided the impetus to focus on marketing bundled utility offerings.

In 2012, Trustpower aimed to significantly increase its customer numbers in New Zealand's metropolitan markets by modernising its branding and launching a rebranding campaign. During this time, Trustpower had provided its customers with an internet service called Kinect, however, due to the lack of uptake Trustpower questioned its viability. A consultant was contracted to analyse the firm and provide some strategic advice and direction for Trustpower and its Kinect internet service. The brand strategist, who knew the consultant and helped develop the Trustpower's rebranding provides this summary:

“This guy... who did this piece of work, his conclusions very simply were, ‘Yes, it's successful, yes you should keep [being an internet service provider], **it gives you a unique place in the market to be a multi-utilities supplier and no one else can do that.** So, you should do that. But **the obvious thing is you need to rebrand** because at the moment you've got this disconnected thing called Kinect and it's confusing and so **you should evolve the Trustpower brand and wrap these things up together.**”
(C3:P1)

Therefore, Trustpower undertook what they called a brand blueprint (Trustpower, 2014). By contracting the brand strategist introduced above, a creative consultant, and other third-party marketing consultants, Trustpower modernised its logo and developed its brand's characteristics, namely Care and Integration. Care expresses the company's commitment to its community while Integration describes Trustpower's unique selling proposition, its ability to bundle utilities (Trustpower, 2014). During this time, their internet service Kinect was disestablished and assimilated under Trustpower's new branding. In April 2014, Trustpower launched the rebranding campaign Better Together, which included a new television commercial designed to increase viewer awareness using wholesome messages. By modernising its internal and external marketing messages, including its logo, their promotional campaign began to increase the brand's profile in population-dense regions outside of Trustpower's usual marketplace.

Following on from the Better Together campaign, Trustpower launched the Comic-Con campaign in 2015. This promotion was designed to attract new customers through its bundled utilities value proposition, offering a low-fee unlimited broadband offering for customers who switch to Trustpower's power product. Specifically, based on findings that customers who had two or more utilities were less likely to churn, Trustpower's Markets department developed a bundled proposition called the \$49 bundle. With the \$49 bundle, customers could sign up for Trustpower electricity and broadband bundle and pay \$49 per month for unlimited broadband for one year. The offer presented a significant monthly saving for customers compared to other

unlimited broadband offerings currently on the New Zealand market. A manager from Trustpower's Markets team discussed the viability of the bundled offering:

“As a multi-utility bundled business, we have a benefit over our Telco competitors, that they don't have another revenue stream. We've got an energy revenue stream that offsets any loss that we are prepared to take in the Telco side of the business because overall our net position is we're still happy with the returns we're getting from those customers. So, we have a revenue stream that [the other Telco's] just don't have. **And it enables us to be a lot more aggressive in terms of the proposition that's put to market.** Which is lucky for us.” (C3:P2)

Furthermore, Trustpower surmised there was a reasonable likelihood that new customers would sign up for telephone services and gas where applicable. In the instances where these extra utilities are provided, both Trustpower's revenue and the likelihood of customer loyalty increases. Trustpower's Markets department passed the \$49 proposition to Marketing, who was charged with developing a campaign designed to penetrate metropolitan areas such as Auckland, Hamilton, and Wellington. Interestingly, due to gaining little traction and profit from them, Trustpower had retreated from these metropolitan areas ten years prior.

Despite its low price point, the marketing manager, whose previous work was with overseas marketing agencies and with direct marketing campaigns, was determined not to make the campaign *shouty*. ‘Shouty ads’ is a term used by advertising agencies to describe ads with loud voiceovers which promote discounted products. Shouty ads are often much cheaper to produce than creative or inspirational advertisements. As Trustpower's \$49 unlimited broadband campaign undercut their telecommunication competitors' prices significantly, the use of a shouty ad may have been justified. However, when presenting their brief to third-party marketing consultants, the marketing manager emphasised Trustpower's desire for their campaign to engage with their target market emotionally. Other key elements that needed to be incorporated were the advantages of bundling, the \$49 per month unlimited broadband offer, and Trustpower's new rebranding theme.

Having received the brief, a third-party creative consultant began working on a concept, which finally emerged as the Comic-Con TVC. Once the creative consultants pitched the concept, the marketing manager and G.M. immediately agreed it was on target with its messaging and branding. Confident in the concept, Trustpower decided *not* to test it with the target market but to proceed immediately to the production of the first TVC and other marketing collateral. The term marketing collateral is an industry term for sales support tools or media, such as internet banners, billboards, or posters. Hence, capitalising on the prior awareness generated by the Better Together campaign, the Comic-Con TVC successfully penetrated the Auckland, Hamilton, Wellington metropolitan markets as well as other regional areas. However, Trustpower received criticism and other forms of pushback from its telecommunication competitors who were unable to match the offer and were losing customers.

By following up on their rebranding with a well-priced and unique promotion, Trustpower began reaching awareness, consideration, and sales targets in successive, strategic marketing campaigns. In March 2015, Trustpower recorded that, due to its campaigns, 47% of new customers came from Auckland, 18% from Wellington, 19% from Hamilton, and 16% from regional New Zealand (Trustpower, 2015b). Furthermore, leveraging from the first Comic-Con campaign, Trustpower has also launched successive Comic-Con themed campaigns. Moreover, Trustpower has resolved to further develop its market penetration momentum and customer retention strategy by developing further multi-utility offerings.

In sum, having found that customers who had two or more utilities with them churned at a significantly lower rate, Trustpower modernised its branding and developed a low priced bundled utility offering. The bundled utilities offering consisted of power and unlimited broadband, with Trustpower surmising that customers would eventually join their gas and telecommunications offerings as well. Realising that their bundled offering was likely to induce customers due to its lower price point, Trustpower appointed a marketing manager and embarked on their growth strategy. Having operated in regional areas, Trustpower decided to enter New Zealand's metropolitan markets with a rebranding campaign first, followed by their unique bundled utilities offering. Utilising the services of internal and external marketing specialists, Trustpower reshaped their brand blueprint and launched the Better Together campaign in 2014 and the Comic-Con campaign in 2015. Thereby Trustpower, a mostly regional supplier of the Bay of Plenty, was able to successfully penetrate metropolitan markets and increase sales in regional areas across New Zealand (Trustpower, 2015b).

4.4 InterCity Group's rebranding project

Known as a premium New Zealand bus company, the InterCity service was developed in 1987 by the New Zealand Government, but was bought by private investors in 1991. The InterCity group has grown to become New Zealand's largest transport network, connecting its customers with over 600 destinations via 130 daily services (InterCity Group, 2015). InterCity Group has two principal shareholders, Ritchies Transport and Tranzit Group and a minor shareholder SBL Group (Business Day, 2008), each of whom have their own branded transport companies. InterCity Group comprises of several domestic and tourist passenger services: InterCity Coachlines, GreatSights, Ritchies Transport, Fullers GreatSights Bay of Islands, Newmans Coach Lines, and awesomenz.com. Ritchies Transport and Tranzit Group are both franchisees of InterCity, with each company represented on InterCity Group's board. Being a franchise, InterCity's head office sells tickets while the various franchisees provide the transportation services. Hence, one of the marketing manager's challenges was to rollout new livery and service standards to staff who were not directly employed by InterCity.

According to an InterCity's general manager, in 2006 a competitor called nakedbus.com arrived in the market and over several years established itself as a low-cost competitor in a nationwide operation. In recent years, nakedbus.com's heavily discounted fares began to erode passenger volume and yield away from InterCity's business, which created a sense of urgency for InterCity. However, rather than become another low-cost carrier, the InterCity Group decided to uphold higher transportation standards, where customers valued the service and InterCity could justify a higher premium. Based on some overseas research on how other transportation companies responded to low-cost carriers, InterCity realised it was essential to differentiate its offering. Therefore, the InterCity Group resolved to offer a superior service, including points of difference such as free Wi-Fi, rather than enter a price war competing as a low-cost service provider.

However, sensing a disconnect between the brand's internal values and how it was being perceived in the market, their marketing manager requested that InterCity survey its customer satisfaction levels. Despite the board's favourable impressions of the buses livery and their overall business performance, approval for the survey was given. While the survey found high levels of loyalty and satisfaction with InterCity, it also found the brand was perceived to be old, tired, and 'with a Government look about it'. Based on these results, as well as the menace of the low-cost competitor, the board subsequently agreed not only to a rebranding project, but also a complete audit of the brand.

To help with the project, the marketing manager briefed several marketing agencies on InterCity's brand audit and listened to each agencies' responding brief. The marketing consultant who won the contract presented what the marketing manager considered the most appropriate approach toward accomplishing the rebranding process. That is, if InterCity wanted a commitment from its franchises, they would have to travel to their major depots and elicit feedback regarding brand values and promises from as many staff as possible. Although expensive and time-consuming, this strategy was agreed to by the board and an eight-month nationwide consultation process with relevant stakeholders was undertaken in 2013.

While visiting each depot, the marketing manager and marketing consultant would conduct a collaborative workshop. To begin, InterCity's marketing manager would introduce the marketing consultant who discussed the necessity and power of branding in an applied manner. Next, the marketing consultant asked the roomful of InterCity's various personnel what it was that InterCity did. Invariably, the attendees would begin with the basic service InterCity performed, 'Driving people from point A to point B'. Following this, other personnel would suggest they did more than that, 'we offer people an experience'. From here, attendees would discuss the InterCity service in both pragmatic and aspirational terms; thereby providing data, the phrasing, consensus, and ultimately the brand values needed to develop the project. When a workshop was completed, the agreed-upon brand values were taken to the next workshop to

provoke further discussion once the agenda had been set. Within each of these rolling workshops, participants discussed the value's authenticity and whether other values were needed. For example, at the first workshop, a bus driver suggested that InterCity should, 'Go the extra mile with a smile.' This catchphrase, although considered corny by some, was widely accepted throughout all the workshops and has now been adopted as InterCity's cultural and organisational benchmark (InterCity, 2015). Other brand values emerged from the workshops held around New Zealand have also been adopted: Ahead of the rest; Customer first; Do it once, do it right (InterCity, 2015). Therefore, from these workshops, the brand promise and values were obtained, often employing the exact phrasing elicited from InterCity's personnel.

Although the above approach carried risks regarding infighting and non-participation, it provided an opportunity for desired brand values to emerge. Moreover, this approach was the most likely to generate commitment from the frontline and administrative levels, a critical outcome due to the various franchisees under InterCity Group's umbrella. In the end, the development of brand values through an internal marketing campaign proved a successful strategy. As the values were created and consolidated by frontline and administrative staff, they readily accepted that these values would appear as part of their job description.

After the process of gathering brand values from InterCity personnel throughout New Zealand proved successful, the marketing specialists chose a professional design agency to develop a new logo and livery. The creative agency returned with five livery options, ranging from a familiar form to a left-field creative interpretation. Each visual option was presented in various situations such as on the sides of buses, on clothing, and marketing collateral, and in three colours. The term marketing collateral is an industry term for sales support tools or media, such as internet banners, billboards, or uniforms. Undecided on which option to choose, the marketing manager proposed that a market researcher survey people on which logo, livery design, and colour InterCity should select. As a result, the researchers found the new green logo, font, and multiple miniature icons that represented different places, animals, and things in New Zealand was the most popular. Therefore, availing a similar consensus or democratic-type process used to develop the brand values and promises, the marketing manager was able to justify the selected livery design.

By March 2014, having decided on the new brand promise, values, and livery, the marketing manager was then responsible for executing the changes over a short change-over period. These changes included repainting buses, creating uniforms, producing new office, internet, and billboard signage, and creating a new Standards and Procedures manual for drivers, before the summer of 2014. Furthermore, the marketing manager produced and distributed a DVD which documented the rebranding process. This short presentation features the directors of Ritchies Transport and Transit Group endorsing the rebrand and also shows a time-lapse of a bus being repainted in the new livery. The DVD, which was given to each staff member, also reminded its

audience of the agreed upon brand values of the InterCity Group. The 'Extra Milers' newsletter was also launched which publicises and rewards the efforts of drivers and other staff who are nominated each month for performing outstanding service. Therefore, the rollout of the new livery, the Standards and Procedures manual, which included the brand promises and values, the DVD, and the Extra-Milers newsletter completed InterCity's rebranding process.

The InterCity rebrand has refocused staff commitment to customer service, provided a renewed sense of pride in the brand, and strengthened InterCity's position as a quality transport service. When the rebranding was proposed in 2012, unbeknown to InterCity, a new low-cost transport competitor would enter the New Zealand market in 2014 (NZ Herald, 2014). Having already undergone the rebranding workshops and livery design, InterCity felt they were in a strong market position in which to compete. However, one might surmise that, if InterCity had not undertaken the rebranding campaign when it had, the new competitor might have had the upper hand. For instance, the InterCity board may have been tempted forgo the comprehensive rebranding process it undertook and opt for a quicker-to-implement top-down approach. Although this approach did not occur, one might suppose such an approach would have unlikely led to improvements in InterCity's frontline commitment to customer service. However, rather than InterCity's marketing project becoming a reaction to competitor moves, it was developed in response to customer feedback and the firm's desire to provide quality customer service.

In sum, due to the perceived tiredness of the buses and service standards, the InterCity Group decided to undertake a brand audit based on their marketing specialist's recommendation. Based on the results of the audit, the InterCity Group decided to undertake a rebranding project. Through engaging with stakeholders throughout its national network, the marketing specialist and a consultant worked with InterCity to develop its now agreed-upon brand values. After the brand values had been established, the marketing specialists contracted a creative agency to design a new look and logo. Due to its democratic approach, personnel believe the rebrand has improved the look and culture of the InterCity Group and has helped secure its place as a premium service provider.

4.5 Summary

Chapter four, along with Appendix 2, has provided a within-case analysis of Tourism Bay of Plenty, Zespri, Trustpower, and the InterCity Group. Each case analyses addresses the research question which examines marketing specialist knowledge and its influence. This chapter has considered the knowledge the marketing specialists used while planning, developing, implementing, and appraising their projects. As shown, the marketing specialists' knowledge might be categorised under the five knowledge domains identified in Chapter 2. As summarised in Table 4.5a, the marketing specialists use of each knowledge domain varied from one another in each stage of each cases' project. For example, the knowledge domains used in TBOP's

planning, developing, implementing, and appraising phases vary slightly or widely with the other cases. In terms of marketing specialist knowledge, this finding demonstrates how all four projects required each knowledge domain overall, but adopted their use within each stage of their project when needed.

Table 4.5a: Summary of the cases' marketing specialist knowledge

	Planning	Developing	Implementing	Appraising
Tourism Bay of Plenty	<ul style="list-style-type: none"> • Marketing expertise • Organisation familiarity • Leadership 	<ul style="list-style-type: none"> • Marketing expertise • Leadership 	<ul style="list-style-type: none"> • Marketing expertise • Leadership • Market intelligence • Life experiences 	<ul style="list-style-type: none"> • Marketing expertise • Market intelligence
Zespri	<ul style="list-style-type: none"> • Marketing expertise • Organisation familiarity • Market intelligence 	<ul style="list-style-type: none"> • Market intelligence • Organisation familiarity • Leadership 	<ul style="list-style-type: none"> • Marketing expertise • Organisation familiarity • Leadership • Life experiences 	<ul style="list-style-type: none"> • Organisation familiarity • Market intelligence
Trustpower	<ul style="list-style-type: none"> • Marketing expertise • Market intelligence • Leadership 	<ul style="list-style-type: none"> • Marketing expertise • Organisation familiarity • Market intelligence • Leadership • Life experiences 	<ul style="list-style-type: none"> • Marketing expertise • Leadership • Life experiences 	<ul style="list-style-type: none"> • Marketing expertise • Organisation familiarity • Market intelligence
The InterCity Group	<ul style="list-style-type: none"> • Marketing expertise • Organisation familiarity • Market intelligence • Leadership 	<ul style="list-style-type: none"> • Marketing expertise • Organisation familiarity • Leadership • Life experiences 	<ul style="list-style-type: none"> • Organisation familiarity • Market intelligence • Leadership 	<ul style="list-style-type: none"> • Organisation familiarity • Market intelligence • Leadership

Concerning marketing specialist influence, various themes emerged at each of the three levels, i.e., the marketing specialists, firm and market levels. At marketing specialists level, the findings describe how marketing specialists influenced each other toward optimising their project's concept and settings. Numerous excerpts above discuss how the marketing managers, consultants, and agents met, workshopped, and deliberated over various aspects of their project. Here, marketing specialists contributed to their area of expertise when discussing marketing tools, processes, and approaches with each other, to develop or enhance their marketing project. For example, one marketing consultant suggested holding regional workshops with relevant stakeholders as their project's best approach. In another case, a marketing consultant suggested to the marketing manager they use the Brand Roadmap as a guide to their rebranding project. Therefore, the marketing specialists used their subject-expertise to influence one another toward optimising their marketing projects.

Concerning the remaining levels, Table 4.5b below combines and summarises the marketing specialists' influence on their firm and their influence on the market. The evidence shows the marketing specialists' influenced their firm using either a collaborative or commanding approach. On the left, Trustpower and InterCity Group's marketing specialists related more collaboratively overall with their firm. Whereas on the right, TBOP and Zespri's marketing specialists had a more commanding approach. Regarding their market level influence, the top level of Table 4.5b shows Trustpower and TBOP's demonstrating a market-shaping effect upon their audience. Whereas at the bottom level of the table, the InterCity Group and Zespri use of research suggested a more market-sensing approach.

Table 4.5b: Summary of the cases marketing specialists' influence

<p align="center">Project fashioned with a <i>market-shaping</i> influence</p> <p align="center">“People don’t know what they want” (C3:P3)</p>			
High collaboration and market-shaping	<p>Trustpower (C3)</p> <ul style="list-style-type: none"> – Marketing specialists <i>collaborated</i> with stakeholders – The marketing project re-shaped the NZ utilities and telecommunications market – “Its diplomacy... I was very good at... gaining the trust and respect of the clients.” (C3:P3) 	<p>TBOP (C1)</p> <ul style="list-style-type: none"> – Marketing specialists were more <i>commanding</i> in their approach with stakeholders – The marketing project re-shaped the market’s perception of the Bay of Plenty – “The marketer... needs to be the <i>driver</i> of growth” (C1:P3) 	High commanding and market-shaping
<p>The marketing specialists’ <i>collaborative</i> approach</p> <p>“What the [marketing specialist was saying was ‘I know how to take you through the process.’” (C3:P4)</p>	<p>↑ Diplomat / Driver ↑</p> <p>The marketing specialist’s traits</p> <p>↓ Champion / Communicator ↓</p>		<p>The marketing specialists’ <i>commanding</i> approach</p> <p>“The [marketing specialist] would very clearly state the path in which we needed to go.” (C1:P4)</p>
	<p>The InterCity Group (C4)</p> <ul style="list-style-type: none"> – Marketing specialists <i>collaborated</i> with stakeholders in workshops to develop internal marketing messages. – Market surveys were conducted to initiate the rebrand as well as verify the final branding and livery settings. – “[Our marketing manager]... was a champion of this process” (C4:P2) 	<p>Zespri (C2)</p> <ul style="list-style-type: none"> – Marketing specialists used the results of their taste surveys when <i>commanding</i> shareholders to change their crop growing behaviour – The Taste Review project was developed from consumer-based taste surveys – “My role is very much a project manager, coordinator, communications” (C2:P3) 	
High collaboration and market-sensing			High commanding and market-sensing
<p>Influence of the project attributed to <i>market-sensing</i></p> <p>“We kept returning time and time again to what our customers had told us” (C4:P3)</p>			

Beginning with the cases on the left-hand side, Table 4.5b depicts findings that suggest Trustpower and InterCity Group's marketing specialists were more collaborative than commanding during their respective rebranding projects. For instance, marketing specialists in both firms often held inter-departmental and consultative workshops with their firm's personnel, with their results proving vital to their market projects' settings and adoption. In contrast, the InterCity Group's marketing project occupies the lower-left category demonstrating its market-sensing approach, typified by many of the project's settings being determined by the market's voice. For example, InterCity episodically surveyed customers and observed competitors to ensure their marketing project's settings strongly correlated to their target market's preferences, thereby influencing their market's purchasing intentions. Hence, the market-sensing approach aimed to maximise their product's adoption and sales in the marketplace.

In contrast, Trustpower's marketing project which bundled power, broadband, gas, and phone utilities re-shaped New Zealand's telecommunications and utilities market. Unlike the InterCity Group, the Trustpower marketing specialists did not use market research to confirm aspects of their project's settings. Therefore, Trustpower's project sits at the top left-hand side, a category signifying both the marketing specialists' collaborative approach within their firm and the project's market-shaping influence.

Regarding the TBOP and Zespri cases on the right-hand side of Table 4.5b, findings suggest the marketing specialists conducted a more *commanding* than collaborative approach during their projects. Rather than running collaborative workshops to collect the perspectives of its personnel, TBOP's marketing manager contracted a marketing agency and employed marketing tools such as the brand onion and benchmarking. Similarly, Zespri referred to their global survey and marketing instruments to determine their projects' settings. Although both firms interacted with their stakeholders or shareholders, these engagements bore little effect on either cases' marketing projects' settings. As Zespri's marketing specialists utilised sensory surveys to determine their tastes settings, they occupy the lower-right category, which depicts their projects' market-sensing and marketing specialists' commanding approach. However, as TBOP's rebranding project aim was to reshape the market's perception of the Bay of Plenty, they occupy the top-right side due to their marketing specialists' commanding approach.

A critical difference between the commanding and collaborating approach is what the marketing specialists used as leverage to influence their firms. As shown, the collaborative approach sought the perspectives of the firm's personnel to develop their project's settings and simultaneously elicit their firm's consensus. On the other hand, the commanding approach used the market's voice, marketing tools and principles, or expert opinion as leverage. Therefore, gaining consensus, or imposing the market voice, expert opinion, or applying marketing tools and principles appear to be essential forms of influence at the firm level.

Another finding shown in the centre of Table 4.5b is the overall traits that participants characterised their marketing specialists. These characterisations were the diplomat, driver (of growth), champion (also guardian), and communicator. These roles or characterisations help bridge the gap between the marketing specialists' knowledge and their influence at each level. Each of these traits appears to reinforce the attributes needed in each marketing specialist as they influence their firm and market. Specifically, the Trustpower *diplomatic* marketing specialist had a collaborative approach, and their project's influence had a market-shaping effect. In the opposite category, Zespri's marketing specialist was described as a *communicator*, who was high in commanding and whose project was categorised as market-sensing. Despite the marketing specialists' location, the evidence provides examples of how they all demonstrated the necessary traits as required during their projects.

In sum, the nature of the marketing project, their firm, and their market determined the marketing specialists' approach at each level. At the market level, the market-sensing approach captured and satisfied an explicit demand by consumers, whereas a new product or service meant undertaking a market-shaping approach. For the market-shaping cases, the firms employed market research primarily to ascertain receptivity to the offering, rather than shape the offering. While one of the collaborative/commanding and market-shaping/sensing categories characterised each case overall, the findings provided instances where marketing specialists and their projects traversed these categories.

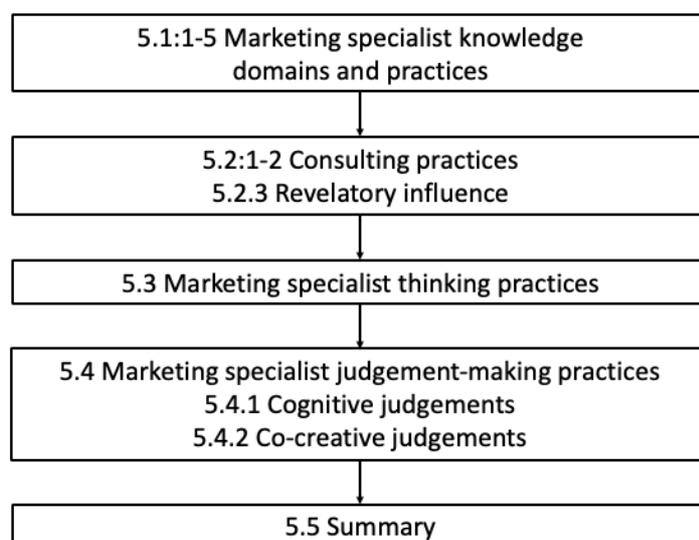
Next, Chapter 5 presents a cross-case analysis of the four cases. In Chapter 5, the five knowledge domains identified in Chapter 2 and confirmed in Chapter 4 are further examined using practice theory. Here, the findings from each of the four cases are collated and analysed in order to understand how practices constitute each of the marketing specialist knowledge domains. Each of the practices identified is, in turn, analysed using cross-case analysis to determine their structure. Furthermore, the cross-case analysis goes on to demonstrate how the marketing specialists' practices, within each knowledge domain, work together to assist decision-making. In Chapter 6, the implications of the knowledge domains, their practices and how they operate in the marketing specialists' ideas and decision-making inform an analysis of the marketing specialists' praxes and influence.

Chapter 5 Cross-case analysis of marketing specialist knowledge

5.0 Introduction

Chapter 5 is a cross-case analysis which addresses RQ1: what are the practices marketing specialists draw on to plan, develop, implement, and appraise a marketing project? While this section serves as an introduction, Section 5.1 aggregates and investigates the marketing specialists' knowledge across the four cases and how they were constituted using a practice theory lens. Described as the practice of consulting, Section 5.2 discusses how marketing specialist knowledge was informed by subject-matter expert sources who worked either internally or externally to their firm. The practices of marketing specialist thinking are analysed and discussed in Section 5.3. Here, their thinking processes and how they used knowledge, whether their own or acquired from other sources, to make decisions on their projects, is discussed. Next, Section 5.4 is an analysis of the marketing specialists' judgement-making practices and the various types of judgements they made, as identified by the participants. The analyses and descriptions of marketing specialist thinking and judgement-making practices are a crucial link between marketing specialist knowledge and its influence. Finally, Section 5.5 summarises this cross-case analysis of marketing specialist knowledge from a practice perspective. Figure 5.0 below provides an outline of Chapter 5's main topics of analysis. Overall, this chapter provides a cross-case analysis of the marketing specialists' knowledge from a practice perspective, how their practices are informed and processed, and how their judgements are made.

Figure 5.0: Outline of Chapter five's topics of analysis



Throughout the cross-case analyses, the identity of the firms investigated are anonymised. To protect their identity, the names of participants have been replaced with those of unisex pseudonyms. However, each participant's role is given to provide the reader with some perspective of the source of each excerpt and excerpts from the marketing specialists' journals have been labelled. Furthermore, the term 'marketing specialist' is used to describe those who work both internally for a firm, i.e., marketing managers, and external marketing contractors and consultants. In other words, rather than distinguishing the 'marketing manager', 'marketing agent', and 'marketing consultant' in the excerpts, the knowledge of all of these roles are treated as the marketing specialists'. Nonetheless, for clarity, occasionally data relating to marketing managers are necessarily distinguished from those relating to a marketing consultant or agency.

5.1 Marketing specialist knowledge domains and their practices

To discuss the marketing specialists' knowledge domains and their practices, the findings are presented in three parts. For the first part, each knowledge domain is re-addressed. While they were distilled from marketing and management literature, excerpts from participants provide work-life examples further justifying each knowledge domains' relevance to this investigation. In the second part, practices that make-up or constitute the knowledge domain are explained using two guides. One, the level the practice was appropriated, whether marketing specialist, firm, or market level is discussed. And two, how marketing specialist practices are constituted by procedures, understandings, and engagements is examined (Warde, 2005). For the third part, each knowledge domain section contains a table which provides a succinct representation of the analyses Tables 5.1.1a to 5.1.1e tabulate how each practice within each domain is constituted, at the marketing specialist, firm, or market level. Therefore, Section 5.1 identifies, examines, and summarises the marketing specialist practices and how they were constituted at the level they occupied.

5.1.1 Marketing expertise

According to Meuser and Nagel (2009), expertise is expressed regarding technical knowledge, process knowledge, and explanatory knowledge. As a knowledge domain distinctive to marketing specialists, marketing expertise consists of specific practices shared among the marketing specialists investigated. These practices were drawn upon during the planning, development, implementation, and appraisal in each of the marketing projects' solutions, strategies, and policies. Marketing expertise was used in decisions for each project at all three levels investigated, namely the marketing specialist, firm, and market levels. To begin to investigate what constituted marketing specialist expertise, participants were asked about why they hired a marketing specialist and how they subsequently performed. In response, a board member of one case answered:

“We wanted someone; I think it was **five or six years senior marketing experience, with practical experience**, having delivered programmes in-market that had **a full skill set around all of the marketing disciplines** from advertising, development and PR and comms, through to acquisition and loyalty management... So my view is that when you bring in an expert, it's about getting the pointy end, so someone that can **bring in practical, experiential knowledge and expertise to then embed that knowledge and capacity** within an organisation and help an organisation realign or refocus.” Jordan: board member (C1:P1).

As shown, Jordan describes an expert as someone with extensive experience in completing the role's required tasks which satisfy Meuser and Nagel's (2009) criteria for an expert. First, concerning technical expertise, Jordan identifies a preference for a marketing specialist with a 'skill set' in advertising, project development, public relations, communications, acquisition, and loyalty management. Second, process or experiential knowledge such as 'five or six years' experience of delivering programs to market is mentioned. Third, explanatory knowledge is also a prerequisite, where the marketing specialist is expected to 'embed' their marketing knowledge throughout the firm. With these qualities of knowledge, the board member suggests that they would be assured that the marketing specialist has expert-level credentials.

As well as indicating the need for expert knowledge, Jordan's excerpt, which corroborates with other data, suggests marketing expertise operates at each of the marketing specialist, firm, and market levels. First, at the marketing specialist level, technical, process, and explanatory knowledge had been demonstrated within a marketing department to develop and launch specific marketing projects successfully. Second, at the firm level, expertise was sought to orient the firm, 'to embed that [marketing specialist] knowledge and capacity' within other personnel in order to realign the firm with its market. Third, as a result of operating at the marketing specialist and firm levels effectively, marketing expertise is expected to influence the market for the firms' benefit. Jordan implies that as the marketing project and market orientation realign and refocuses the firm, the firm's objective in the marketplace is more likely to be realised.

Although Jordan required their applicants have five or six years of marketing experience, a tertiary qualification was not stipulated for their marketing manager position. Most of the marketing specialists in the study were not marketing graduates. Accordingly, the following excerpt from a marketing manager suggests tertiary training does not necessarily preclude expertise, and that marketing experience alone may provide the practitioner with a reputation as an expert:

“**I don't believe good marketers need to be formally trained** in marketing. But I do believe they need to be experienced and have developed previous projects and campaigns.” Carter: marketing specialist (C1:P3).

Both of the excerpts above describe how expertise is measured primarily in terms of experience, with the marketing specialist above suggesting that tertiary qualifications are not always

essential. Of interest is that this attribute of a marketing specialist was provided by Carter, who graduated with a major in marketing.

Having sufficient experience is consistent with both Meuser and Nagel's (2009) requirement for technical, process, and explanatory knowledge, and with practice theory. As shown, being involved in a sufficient number of marketing projects may provide the practitioner with the necessary technical, process, and explanatory skills to be considered a marketing specialist. This view links with practice theory which claims practices or background coping skills (Chia & Holt, 2006), can be learned and shared among practitioners.

As a knowledge domain, marketing expertise is knowledge regarding the development, implementation, and control of marketing solutions, strategies, and/policies. Analysis of the cases indicates that marketing expertise operated at every level with the practices that constitute this knowledge domain. The practices being (1) conceptualising at the marketing specialist level, (2) consolidating at the firm level, and (3) championing at the market level. These practices each consist of procedures, understandings, and engagements which are shared among the marketing specialists investigated (Reckwitz, 2002; Warde, 2005). Each of these practices and their constituent procedures, understandings, and engagements provided crucial elements for each firms' marketing projects.

5.1.1.1 Conceptualising at the marketing specialist level

Conceptualising was identified at the marketing specialist level across each of the cases. Conceptualising describes the marketing specialists engaged each other's cognitive, research, and material resources to help ascertain, develop and decide a marketing projects' settings. In other words, conceptualising involves the marketing specialists hypothesising and considering the project's manifest, based on the brief and resources available to them. As one of the creative consultants points out, having clarity regarding the resources and the project's brief makes the practice of conceptualising easier:

“[The firm] committed the resources and the money to do a large scale [market project]. So [when we have] **a clear brief, the resources, the support, and a clear emotional target**, it's actually quite easy to do a good job.” Lane: marketing consultant (C3:P5).

During their projects, the marketing specialists drew upon practices of conceptualising to creatively employ known marketing procedures, the firm's resources, the project's context, and the outcome they wanted. From the available intelligence, the marketing specialists distilled ideas, calculated their cogency to the firm or market and then assessed how to proceed. A stimulant to this iterative process was progressively asking questions: for example, 'what are we trying to achieve?', led to 'who's our target audience?', which led to 'what are we promising people?' This process connects the procedures with current understandings and engages the

marketing specialists with one another to conceptualise their project in a seemingly progressive and robust manner.

The practice of conceptualising at the marketing specialist level consists of procedures, understandings, and engagements. Marketing procedures or 'know-that' knowledge, was used to develop the project's brief by drawing conclusions from the marketing specialist's expertise, market data, and the firm's goals. In an excerpt above, the board member Jordan described a 'wish-list' for hiring a marketing specialist. The criteria included previous experience with advertising, development, public relations, communication, customer acquisition and loyalty management; each of which required 'know-that' or technical knowledge. In another example, a specific procedure used in a project is described:

“We [used] the... **brand onion process**. So that starts basically with first of all, what are our business objectives? It then starts with who's our target audience?” Kelly: marketing consultant (C1:P2).

Concerning procedures, Kelly describes the first steps of a marketing tool that is known to both him and the marketing manager. While knowing the correct procedure to apply to a marketing project is vital, understandings or 'know-how' employ the known procedures appropriately. Here, understandings equipped the marketing specialists to identify and judiciously apply marketing tools and principles to their project in light of their firm's objectives. As the following excerpt demonstrates, the marketing manager's understandings of the project and its objectives were critical:

“[The marketing manager had a] very key role in the strategic level to define the project, to define the objectives of the project. Really from a business... perspective of **understanding what the whole project was about before the project [began]**.” Drew: marketing consultant (C2:P4).

Engagements describe how marketing specialists were able to grasp not only their expertise, ideas and marketing tools but those of others to reach a specific end. Hence, these engagements were accomplished in light of the market data and the firm's objectives, to help ascertain each projects' settings. The following excerpt provides an example of a marketing specialist not only understanding but accomplishing her boss's objectives:

“What [our marketing specialist] has done, which has given me confidence, is she's been able to **demonstrate that she can interpret what it is that I told her** that the organisation is trying to achieve.” Corey: senior manager (C3:P4).

The senior manager above suggests that, due to the marketing specialist's capacity in what practice theory calls engagements, the marketing specialist had perceived and clearly understood their manager's directives for their firm. Therefore, along with their know-that and know-how, the marketing specialists' engagements with one another were critical in conceptualising their firm's marketing project and its purpose.

In summary, conceptualising was the practice identified when marketing specialists use their marketing expertise at the marketing specialist level across each of the cases. When conceptualising their project, the marketing specialists engaged each other's cognitive, research, and material resources to help ascertain, develop and decide a marketing projects' settings. Across the cases, if the marketing managers lacked the specialist skills or experience to conceive any aspect of a viable project, they sought, hired, and worked with other specialist consultants. To determine each marketing projects' settings, the marketing specialists considered the available data, provided ideas or experiences and employed rigorous processes to test them. The marketing specialist practice of conceptualising projects was crucial as each firms' objectives, branding, and resources were unique and needed to be considered and addressed in context. As shown, the practices of conceptualising at the marketing specialist level required distinct procedures, understandings, and engagements shared among experienced marketing specialists. The conceptualising practices of the marketing specialists were utilised to propose relevant ideas and approaches when determining aspects of their marketing project's settings.

5.1.1.2 Consolidating at the firm level

Consolidating is the marketing expertise practice that was identified at the firm level across the cases. Consolidating describes how marketing specialists enlisted and engaged with their firm's personnel and material resources to develop, innovate, and embed the marketing projects' settings. Although the marketing specialists, in some cases, may have determined the appropriate settings for their marketing project, the practice of consolidating involved stakeholders in the decision-making. In doing so, it was anticipated by the marketing specialists, that the marketing project's settings would be further questioned and refined as well as adopted by the stakeholders and firm. In the following example, the marketing specialists interacted with their firm's personnel at every hierarchical level to both develop and embed their marketing project:

“If [the marketing process] wasn't done in consultation with these several hundred [frontline staff] and other staff and the [internal stakeholders], it **was just wallpaper**. It was just expensive window dressing.” Logan: marketing consultant (C4:P5).

By consulting with personnel, the marketing specialists helped mitigate the risk of the marketing project's settings being irrelevant or unnecessary. Here, marketing specialists engaged in dialogue among all levels of the firm to seek input into aspects of the project relative to the personnel's area of responsibility. For example, senior managers provided input regarding the project's obligation to reach specific objectives, whereas frontline staff discussed issues around levels of customer service and maintenance of offerings. During this process, the marketing specialists educated personnel regarding the role of marketing activities, such as branding and brand promises. As intended by the marketing specialists, personnel at each level developed or deepened their understanding and insights into both their marketing project's and

their marketing specialists' role in the firm. Therefore, consolidating the marketing project's settings meant that both the marketing specialist's and the stakeholders' perspectives were combined to develop and embed each marketing project within its firm.

The practices of consolidating at the firm level are comprised of procedures, understandings, and engagements. Regarding procedures, marketing specialists knew they needed to harness the potential of latent human and material resources across the firm that might serve to refine their projects' settings:

“So when we produced **our straw man proposals**, we sat down with our wide group... and said ‘Here’s our thing, about four of us developed the proposals, here’s our thinking. **Let’s step through why we’ve landed up here**. What do you guys reckon?’”
Rowan: projects manager (C2:P3).

As shown, the consolidation procedure required both the marketing specialists, ‘about four of us’, and the ‘wide group’ of stakeholders to consider the settings proposed. Concerning understandings, marketing specialists understood that resistance to their ideas and decisions was likely to manifest at some point and prepared their consolidating approaches accordingly. Therefore, when consolidating at the firm level, the marketing specialists understood that stakeholders needed to be kept abreast of developments and decisions regarding the marketing projects' settings:

“Any question or any hot point is solved by sitting down and having a discussion and talking people through why this is what it is. Because **if you took any other approach, people can quickly lose faith** in what you’re up to.”
Rowan: projects manager (C2:P3).

Therefore, the engagements of marketing specialists consisted of proactive interaction and engagement with personnel throughout the firm to further develop and embed the marketing projects' settings. Engaging often meant that marketing specialists adapted themselves to approach various stakeholders and contexts appropriately:

“[Our marketing specialist] has the **ability to be a chameleon** within the organisation.”
Kelsey: senior manager (C1:P4).

As the senior manager describes, their marketing specialist was able to engage with others in the firm in appropriate and relevant ways. By becoming ‘a chameleon within the organisation,’ the senior manager described the marketing specialist's practice of spanning functional and hierarchical boundaries to partner with personnel around the marketing project.

To summarise, the practice of consolidating categorises how marketing specialists use their marketing expertise at the firm level across the cases investigated. Consolidating describes how marketing specialists enlisted and engaged with their firm's personnel and material resources to develop, innovate, and embed their marketing project's settings. In each case, the marketing managers consulted relevant personnel to both propose the project and its aims and to collect their perspectives on the project. Here, the marketing specialists would use their marketing

expertise to determine which ideas and perspectives, both their own and those of stakeholders, would determine their marketing project's settings. Accordingly, the marketing specialists would adapt aspects of the project to suit the firm's resources, logistics, or branding parameters. The marketing specialist practice of consolidating was vital as the perspectives of the firm's personnel proved crucial in developing viable marketing projects. This task was usually headed by each firm's marketing manager who roved throughout the firm in order to centralise the perspectives of personnel and apply them to the marketing project. As discussed, although headed by the marketing manager, consolidating the firm required the specialist procedures, understandings, and engagements of both the marketing manager and the marketing consultants. In brief, the consolidating practices of the marketing specialists at the firm level assisted in developing viable and relevant input for each of the marketing project settings.

5.1.1.3 Championing at the market level

At the market level, the practice of championing was demonstrated across the cases. The practices of championing represent marketing specialists targeting, brandishing, timing, supporting, reinforcing, and defending their marketing project's settings toward optimisation and maturation. Here the marketing specialists monitored the market's responses to their marketing projects and, if needed, developed contingencies to take advantage of relevant market conditions. During this process, the marketing specialists considered their project's life cycle, innovations, elements, or any leverage points the market may offer to further the project or develop new projects. For example, the following excerpt shows that despite how early a project was in its life cycle, one senior manager considered their firm's next move in the marketplace:

“Is this proposition even worn out yet?... My view is that there is a lot of time and momentum left in this campaign... but **the heat is now on to go, 'Oh what next?'** What are we going to do next?” Tristan: senior manager (C3:P2).

When championing, the marketing specialists considered how to maximise the market's response to the project. Apart from sales data, marketing specialists monitored both the target audiences' and the competitors' emotional and tangible responses to their marketing project. The market would be surveyed for any apparent change the marketing project had produced and customer satisfaction levels or responses from competitive were quantified. For example, a marketing project was launched just as another competitor was entering the market, by which the firm became resolved to execute their project effectively. The market was scanned post-launch for other ways or means the marketing specialist could find future directions or advantages for the firm.

As with the other practices of marketing expertise, procedures, understandings, and engagements were identified as marketing specialists championed and leveraged their project throughout the market. Concerning procedures, the marketing specialists considered the project's timing and other relevant attributes in light of their market's preferences. The

marketing specialists knew these factors would contribute significant leverage toward the project's potency:

“We purposely set [the marketing project] **to suit our market.**” Kelsey: senior manager (C1:P4)

Regarding understanding, by adjusting the settings of their respective marketing projects, the marketing specialists influenced their target market using calculated and creative measures. For example, one of the projects temporarily changed their strapline to partner with a nation-wide reality television show in order to widen its range of audience:

“They approached the TV network, and they got them down, and they promoted it, **and they got huge huge exposure.**” Parker: marketing consultant (C1:P5).

About engaging at the market level, the marketing specialists showed that the market's expectations must be met as the market responds to the project. If the stated expectations of the market were not met, the firm would have failed to sufficiently implement the marketing project's intent. Following the launch of a marketing project, one firm engaged with its market in a way which is consistent with how the firm was rebranded :

“The way we engage with people has changed because we've now got a very different personality behind who we are. **We're proud of our personality now.**” Casey: marketing specialist (C4:P1).

In brief, the practice of championing describes how marketing specialists use their marketing expertise at the market level. The practice of championing encapsulates how marketing specialists target, brandish, time, support, reinforce, and defend their marketing project's settings toward optimisation and maturation. Throughout each project investigated, the marketing specialists' would monitor, survey and scan their market for responses or leverage to improve their project's effectiveness. As described, the main purpose of drawing upon their marketing expertise at the market level was to optimise their project's market penetration or returns. Therefore, championing required the experience of the marketing specialists involved throughout the project, due to the implications any adjustment to the project's settings might cause. In brief, the practices of championing drew upon the marketing specialists' expertise to investigate the furthering of their project's aims and impact on the market.

To summarise this section, marketing expertise is defined as practices shared among marketing specialists that are drawn upon to develop, implement, and control marketing solutions, strategies, and policies. Instances of marketing expertise described above demonstrate technical, process, and explanatory knowledge (Meuser & Nagel, 2009). The practice that constitutes marketing expertise are conceptualising at the marketing specialist level, consolidating at the firm level, and championing at the market level. Each of these practices was comprised of procedures, understandings and engagements which provide further insight into what constitutes

the expertise of the marketing specialist. As discussed, each of the marketing specialists' experiences and areas of expertise was developed in various ways. However, despite their varied backgrounds, each was engaged by their firm due to the marketing knowledge they could draw upon to conceptualise, consolidate, and champion their project. As shown, senior managers and board members of each firm recognised that engaging marketing specialists would positively influence the project's settings, the firm's branding, market orientation, and subsequently, sales volumes. Therefore, as a knowledge domain, marketing expertise proved both crucial and valuable to each of the firms investigated. In sum, the marketing specialists' expertise was utilised to optimise their projects' settings, their firms' human and material resources, and their markets' responses to their offering. The three practices of marketing expertise and how they are constituted are summarised in Table 5.1.1.

Table 5.1.1: Marketing expertise knowledge domain by constituent practices.

		Practices are constituted by:			
		Procedures	Understandings	Engagements	
		Def. Explicit rules, principles, precepts, and instructions, what is sometimes called discursive ‘know-that’ knowledge.	Def. Knowledge of what to say and do; skills and projects, sometimes called ‘know-how’ (i.e., tacit cultural templates for understanding and action).	Def. Linking ends, means, and moods that govern what makes sense to do beyond the procedures and understandings.	
Knowledge domain: Marketing expertise	Marketing specialist	<p>Conceptualising: Def. Marketing specialists engaged each other’s cognitive, research, and material resources to help ascertain, develop and decide a marketing projects’ settings</p>	Marketing procedures were used to develop the project’s brief by drawing conclusions from the marketing specialists and stakeholder’s expertise, market data, and the firm’s goals.	Identified and applied cogent cognitive and material resources for the project to meet objectives.	Grasps one’s and other’s expertise, ideas, and marketing tools in light of the market data and the firm’s objectives to conceive and consolidate the project.
	Firm	<p>Consolidating: Def. Enlisting their firm’s personnel and material resources to develop, innovate, and embed the marketing projects’ settings.</p>	Marketing specialists knew to harness the potential of latent human and material resources which might serve to refine the project and its settings.	Understood how resistance to change was likely to manifest at some point and prepared their consulting approaches accordingly	Proactive interaction and engagement with human resources throughout the firm to further develop and embed the marketing projects’ settings.
	Market	<p>Championing: Def. Targeting, brandishing, timing, supporting, reinforcing, and defending the marketing project’s settings toward optimisation and maturation.</p>	The marketing specialists considered the project’s timing, the personality, and other relevant attributes in light of their market’s preferences, knowing that they would have a significant influence on the project’s potency.	Knew to gain maximum impact on their target market through creative, effective, and efficient ways.	Market expectations must be met as the target audience responds to the project.

5.1.2 Organisation familiarity

As a knowledge domain, organisation familiarity characterises the marketing specialists' knowledge of the firm and the industry in which the firm operates. Specifically, organisation familiarity describes the marketing specialists' knowledge of the firm's personnel, branding, structure, culture, stakeholders, resources, capabilities, strategic intent, identity, products, offerings, and its commercial setting. The knowledge domain of organisation familiarity emerged at both the marketing specialist and firm levels. As the data collected suggests, having organisation familiarity proved crucial in developing confidence in decisions regarding the marketing project settings. As a marketing consultant puts it:

“The really good marketers, whether it’s a small business or a big business, are actually **completely across what the business is trying to do and sell**, and the product development and the R&D that’s going on.” Logan: marketing consultant (C3:P1).

According to a board member of one firm, Harper, organisation familiarity was vital due to both the consensus and foresight it generates:

“I couldn’t imagine anybody without experience in a marketing role doing [the project] so smoothly and understanding the process and buy-in and all of the things that need to be ticked off... not many people without that training could actually **see how they all hang together**.” Harper: board member (C4:P7).

Apart from developing the appropriate settings for the marketing project, the board member here suggests the marketing specialist’s organisation familiarity enabled them to minimise disruptions throughout their project. For instance, the board member above discusses how their marketing specialist mentally superimposed the marketing project’s settings upon the firm, to determine each change’s likely effects. By seeing ‘how they all hang together’, the marketing specialist was more adroit at ‘smoothly’ implementing a politically and logistically complex project. As highlighted from several responses, organisation familiarity differentiated a firm’s marketing managers from third-party marketing consultants. Specifically, while the marketing consultants were experts at research, branding, or advertising, they lacked the organisation familiarity the marketing managers possessed to make decisions suited to the firm’s characteristics:

“I’m not saying that the [marketing] agency aren't actively involved in that process, but it's a **lot harder for someone external to the organisation to come in and capture all that essence faithfully and stay true** until they're all the way through the development of the brand. That's where I think [our marketing manager's] input was the most important.” Jesse: senior manager (C4:P2).

The senior manager above describes how the marketing manager’s connection to the firm provided management greater confidence that their project would be successfully implemented. The senior manager indicates that although an agency might bring a degree of expertise to a marketing project, they lack sensitivity to the ‘essence’ of their firm as well as the relational

mechanisms. Moreover, marketing managers can be held to account for the implementation of a marketing project throughout the firm, whereas a marketing agency lacks the same level of accountability. The following excerpt from a board member of another case speaks plainly on this matter:

“[Third-party agencies] have **no vested skin in the game**. So [they] can make a whole lot of recommendations and then [leave]. And you don’t have to implement them. You don’t have to **deal with the fallout, the outcomes, the opportunities**.” Jordan: board member (C1:P1).

As the above excerpts show, the marketing managers’ organisation familiarity was vital to their firms across the cases. Organisation familiarity helped the marketing specialists understand, process, execute, and integrate their projects due to the marketing manager’s knowledge of the firm, and its personnel, branding, culture, and commercial setting. This knowledge domain enabled the marketing specialists to predict how the proposed settings of a marketing project, or aspects of it, would affect the firm. Organisation familiarity also provided an understanding of the important processes and rapport with stakeholders needed to implement a marketing project. Also described are the two main levels that organisation familiarity operated in, namely the marketing specialists and the firm level. The following quote from a marketing executive explains both how and why. How? By building relationships with stakeholders and external creatives. And why? For mutual results. In other words, by collaborating in the marketing project, each stakeholder is likely to benefit as the firm succeeds:

“Having the **relationships with the decision makers** within [our firm] as well as **the relationships with the creative team**, that you can have honest feedback with them to get what you needed from them... **building the relationships with the people that you work with to get mutual results**.” Riley: marketing executive (C3:P6).

As discussed, the case studies showed that organisation familiarity operated at the marketing specialist and firm levels. The two practices identified that constitute organisation familiarity are (1) anchoring, and (2) ingraining, with each of these practices consisting of procedures, understandings, and engagements (Reckwitz, 2002; Warde, 2005).

5.1.2.1 Anchoring at the marketing specialist level

Anchoring describes how marketing managers upheld their understanding of their firms’ branding, resources, and objectives against other marketing specialists’ creative input or proposals. One of the most essential attributes of the marketing managers was how their organisation familiarity aligned external marketing specialists or consultants toward their firm’s context and branding. In the following excerpt, one of the marketing managers describes the importance of knowing her firm, its ways of doing things, and its objectives:

“The first couple of months... were getting my knees and feet under the table and just learning... **learning about the company**. I mean you’ve got to understand **you can’t**

be producing marketing and advertising unless you understand what sort of strategic goals and objectives of the company are... understanding enough about [my firm] and about **what the company stood for and what was important to the company**, in terms of values and things like that, and what was important to the company.” Piper: marketing specialist (C3:P3).

Piper notes that, without organisation familiarity, the marketing manager could not be expected to produce relevant and authentic marketing collateral, despite working alongside experienced consultants. As shown, ‘learning about the company’ was a crucial antecedent to developing cogent project settings. While the marketing managers were responsible for anchoring the marketing project settings, senior managers also recognised these practices’ necessity:

“Whenever we deliver something, it has to be **true and authentic** for [our firm]. And could an **external person** who isn't in the business on a day to day basis deliver that? **I'm not sure.**” Tristan: senior manager (C3:P2).

As shown, anchoring their projects’ settings provides senior managers confidence that a marketing manager will be ‘true and authentic’ to the firm’s capabilities, branding, and objectives. Another example from a senior manager illustrates how marketing contractors are vital to marketing projects, due to their subject-matter expertise, yet required the organisation familiarity of their marketing manager:

“It’s actually **really hard for a third-party external consultant who doesn’t live and breathe your business every day** to deliver stuff that ticks all the boxes and is consistent with what you are trying to achieve from a marketing and positioning perspective. So for me having [the marketing manager] who really **understands that innately and can communicate that to a third-party** saying, ‘This is what I want to achieve, now give me some clever ways of communicating that.’” Corey: senior manager (C3:P4).

As Corey asserts, due to their marketing manager’s organisation familiarity, they could anchor or corral their marketing consultant’s pitches to develop an appropriate and on-brand marketing project. Further, marketing consultants also acknowledged the importance of the marketing managers’ organisation familiarity:

“The ownership of the brand; **it’s the marketers** that are within company. A lot of **it is their responsibility to make sure that that brand is upheld and protected.**” Lane: marketing consultant (C3:P5).

Although Lane provided creative ideas for their marketing project, he relied on the marketing managers’ understanding of their firm’s characteristics to develop their projects’ settings appropriately. The marketing managers’ understanding of the firm assisted the marketing consultant in developing suitable concepts, thereby anchoring the marketing project’s settings efficaciously within the firm.

As with other practices, anchoring the marketing specialists was apparent in the procedures, understandings, and engagements of the marketing specialists’ knowledge. Concerning

procedures, the marketing managers tested new findings and ideas against the backdrop of their firms' objectives, resources, and branding. Dovetailing with procedures, marketing managers ballasted the external marketing specialists' creative inputs until they aligned with their firms' context and requirements. As the following senior manager identified, their marketing manager's understanding of their firm provided a significant advantage over the services of a consultancy alone:

“That’s **the advantage of having [our marketing manager] over a consultancy**. A far **more intimate understanding** of what we do.” Kelsey: senior manager. (C1:P4).

Concerning engagements, anchoring meant that crucial element to their projects' settings was authentic to their firm's objectives, resources, and branding. These procedures, understandings, and engagements which constitute the marketing specialists' anchoring practices were critical for each marketing project's development and acceptance by the firm.

In sum, the practice of anchoring discusses how marketing managers used their organisation familiarity at the marketing specialist level across each of the cases. Anchoring describes how the marketing managers upheld their understanding of their firms' branding, resources, and objectives against other marketing specialists' creative input or proposals. Here, the marketing managers' practices of anchoring were crucial in navigating the marketing consultants' ideas against the firm's branding, resources, and stakeholder objections when determining the project's settings. Due to the marketing managers' practices of anchoring, senior managers, stakeholders, and the marketing consultants gained greater confidence in their project's effectiveness. As discussed, anchoring at the marketing specialist level was constituted by specific procedures, understandings, and engagements of the marketing specialists, particularly the marketing managers'. In brief, the practices of anchoring describe how the marketing managers' organisation familiarity was used to develop projects' settings that authentically represented their firm.

5.1.2.2 Ingraining at the firm level

The marketing managers developed their organisation familiarity by ingraining themselves within the firm. Ingraining is described as marketing managers widening and deepening their understanding of and engagements with, and accountability to their firm. For instance, data showed how the marketing manager's proximity to their senior manager, organisational data, stakeholders, decision makers, and organisational objectives helped deepen their links within the firm:

“[Our marketing manager] **works really closely with [our senior manager]**, right. [Our senior manager]... has his hands on every single pulse beat within the [firm]. He knows the numbers inside out. He knows where he wants to take [the firm]. And [our marketing manager] works very closely with him to help deliver that. So by **having [our marketing manager] sitting 10 metres away from him and close to his**

thinking and their regular weekly meetings etc. I guess allows [our marketing manager] to understand where we want to take our business, where [our senior manager] wants to take our business, where the board wants to take the business... So **it's that proximity thing**." Tristan: senior manager (C3:P2).

Tristan stresses how the marketing manager is closely situated to the senior manager and is involved in meetings which facilitate their ingraining into the firm. The senior manager is already ingrained within the organisation and has the responsibility for their firm's strategic objectives. To execute the marketing side of these objectives, the marketing manager had access to the senior manager, the relevant resources, and the insights they provided. In another case, the marketing manager allied themselves with personnel who provided an understanding of the politics, culture, and industry behaviours that less-invested personnel may not have ascertained. Moreover, a senior manager from another case asserted that the marketing manager's effectiveness in ingraining with the firm resulted positively on their decision-making and ability to develop and launch a marketing project:

"Now [knowing stakeholders is] extremely important because she **understands the stakeholders** and to get any project across the line **she's gotta consider all those** in any of her decision-making." Kelsey: senior manager (C1:P4).

A significant advantage of the marketing specialists' ingraining practices was understanding the preferences of stakeholders and navigating through their objections. The following excerpt indicates that marketing specialists' familiarity with stakeholders enabled them to both anticipate particular objections stakeholders may have and plan how to overcome them:

"What are the key variables and putting the right information together? ...Knowing that there is always going to be people who are pushing against you... and **anticipating what some of those questions and challenge points** are going to be and **making sure you are well armed** to deal with those." Taylor: marketing specialist (C2:P2).

Each of the cases highlighted other advantages of having marketing specialists who are familiar with the firm due to their familiarity with it. For instance, the following excerpt describes a marketing specialist's position within the firm as a vantage point from which to coordinate and drive a marketing project. From this vantage point, the marketing specialist may not only understand and engage with stakeholders but understand how the project may impact on the logistical and branding aspects of the firm:

"There is a subtle but significant difference in terms of [the marketing project] being coordinated and driven from an internal point of view, where there is you know, the vantage point of being inside the organisation... So, if there wasn't **somebody that could see how this is evolving as a brand in how it was going to be applied in everything**." Jesse: senior manager (C4:P2).

As shown, a marketing specialist who was ingrained within the firm provided the senior manager further confidence their project would take on more holistic and longer-term benefits. Ingraining also describes how the marketing managers had a level of allegiance to the firm.

Therefore, confidence in the project was cultivated as the firm recognised that the marketing manager has the best of intentions for the firm.

As with the other practices, ingraining is comprised of its procedures, engagements, and understandings. Regarding procedures, as an excerpt from a board member outlines, marketing managers knew the systems, stakeholders, and objectives of the firm and their implications on their projects' settings:

“[People who are not marketing managers] **probably don't know to look out for those pitfalls.**” Harper: board member (C4:P7).

Due to their ingraining within the firm, the marketing managers predicted, sometimes instinctively, whether or not aspects of the marketing project would be appropriated or not. These instincts were developed over time and by the marketing managers constant involvement within their firm and its commercial setting. Because of their organisation familiarity, the marketing managers understood the capabilities, resources, and preferences of their firm's personnel and stakeholders, and how these factors may fashion their projects' settings. Marketing managers and their employers knew that these understandings take time to accumulate in order to be applied confidently:

“[I won a marketing role because I had a] **solid understanding of the business, growth agenda, business strategy,** I was a member of the global executive team in my [previous] role, so I had that senior involvement and setting and understanding of the business strategy. I had the understanding of **relationship skills, not only with [stakeholders] but also internally.**” Peyton: marketing manager (C2:P1).

As the excerpt suggests, Peyton held a previous non-marketing position within the firm but applied and won a marketing role, against other marketing specialist applicants. This finding suggests that one's familiarity with an organisation, with its stakeholders, and the associated allegiance it affords, presents a significant advantage for marketing managers. This advantage may also be implicit in the engagements that constituted ingraining, that the marketing managers' intimate knowledge of the firm provided confidence to decision makers on their projects' effectiveness:

“[A new marketing manager] **might have all the technical competencies... but they wouldn't have our confidence as a management team.** And you would be at risk of constantly second guessing and questioning the decisions that [a new] marketing manager was making. **Whereas... we know that [our marketing manager] knows our business intimately.**” Cameron: senior manager (C4:P3).

As Cameron asserts, while a marketing managers' expertise may be above reproach, their ingraining provides the firm's incumbent peers more confidence in the marketing managers' decision-making.

The practice of ingraining categorises how marketing managers used their organisation familiarity at the firm level across the cases investigated. Ingraining describes the marketing

specialists' practices of widening and deepening their understanding of and engagements with, and accountability to their firm. Across the cases, the specialists, particularly the marketing managers, sought to align their project's settings accurately by expanding their understanding of their firm's culture, branding, politics, and commercial setting. Therefore, the marketing managers kept proximity to senior managers, organisational data, and the firm's subject-matter experts, as well as demonstrate their commitment to their firm and project. As described, the practice of ingraining with the firm was attributed with the procedures, understandings, and engagements of the marketing manager. However, the consultants' familiarity also deepened during the project. Therefore, their proximity and commitment to organisational data, culture, and objectives meant the marketing managers' ingraining practices were crucial to their projects' settings and in earning confidence from their managers.

To summarise, the practices of anchoring and ingraining constituted the marketing specialists', particularly the marketing managers', knowledge domain of organisation familiarity. Anchoring practices represent how marketing managers upheld their understanding of their firms' branding, resources, and objectives against other marketing specialists' creative input or proposals. On the other hand, ingraining represents the widening and deepening of the marketing managers' understanding of, and engagements with, and accountability to their firm. Each of these practices was composed of procedures, understandings and engagements which describes how the organisation familiarity of the marketing managers was constituted. These practices were cultivated over time by networking with, learning about, and committing to the firm and drawn upon to frame the settings and generate consensus toward the marketing project. Although the marketing manager was the main reference for the firm, the other marketing specialists' organisation familiarity also increased during the project. As discussed, the marketing specialists' understanding, proximity, and accountability to their firm increased their ability to determine settings for their projects that were authentic to their firms' branding, objectives, and resources. Therefore, organisation familiarity was an essential knowledge domain and provided crucial perspectives to each of the cases investigated. The attributes of organisation familiarity are summarised in Table 5.1.2.

Table 5.1.2: Organisation familiarity knowledge domain by constituent practices.

		Practices are constituted by:			
		Procedures	Understandings	Engagements	
		Def. Explicit rules, principles, precepts, and instructions, what is sometimes called discursive ‘know-that’ knowledge.	Def. Knowledge of what to say and do; skills and projects, sometimes called ‘know-how’ (i.e., tacit cultural templates for understanding and action).	Def. Linking ends, means, and moods that govern what makes sense to do beyond the procedures and understandings.	
Knowledge domain: Organisation familiarity	Marketing specialist	Anchoring Def. Marketing managers upheld their understanding of their firms’ branding, resources, and objectives against other marketing specialists’ creative input or proposals.	The marketing managers tested new findings and ideas against the backdrop of their firms’ objectives, resources, and branding.	The marketing managers ballasted the external marketing specialists’ creative inputs until they aligned to their firms’ context and requirements.	A key element to their projects’ settings was their authenticity to their firm’s objectives, resources, and branding.
	Firm	Ingraining Def. The marketing managers widening and deepening their understanding of, and engagements with, and accountability to their firm.	The marketing manager’s comprehension of the systems, stakeholders, and objectives of the firm and their implications regarding their projects’ settings.	The marketing managers knew the capabilities, resources, and preferences of their firm’s personnel and stakeholders’ preferences and how they may fashion their projects’ settings.	The marketing manager’s intimate knowledge of the firm provided confidence to decision makers on their projects’ effectiveness.

5.1.3 Market intelligence

As one of the knowledge domains identified in the literature review, market intelligence depicts the marketing specialists' understanding of their firm's target audience and competitive setting. More specifically, market intelligence is defined as knowledge comprised of formal and informal insights into current and anticipated market needs and movements and includes competitor activities (Hattula et al., 2015; Kohli & Jaworski, 1990; Maltz & Kohli, 1996). Market intelligence use was identified at both the project and market level. Within the cases, examples of market intelligence included market research, sensory work, benchmarking, competitor reconnaissance, and market-testing. These methods were designed to inform the marketing specialists further how to design their marketing project and appraise its progress:

“Marketing at its heart is about being the **spokesperson for the consumer** and saying, ‘What is it they want? How is their marketplace changing? What are the trends that are changing there?’” Kelly: marketing consultant (C1:P2).

Within each case, market intelligence described the voice, dispositions, and intentions of the market. With this data, the marketing specialists sought to understand their audience's demands, motives, and trends, and the urgency of each, in order to accurately adjust their project's settings and re-orient the firm. Therefore, the marketing specialists knew how to find market data, analyse it, and discern the relevant findings, and develop robust findings or a ‘judgement’ the firm can act on:

“So then you've got a bunch of **data that tells you a story and that's where judgement comes in** at that point.” Corey: senior manager (C3:P4).

While market intelligence provides the firm with some insights of its market, it also provides an awareness of how the market perceives the firm:

“[The market research we commissioned] came back with the fact that we were, in people terms, we were a mature person, reliable, trustworthy, honest, absolute integrity, **but we were a bit old hat and a bit tired.**” Harper: board member (C4:P7).

Another vital role of market intelligence, as the following example shows, is competitor related. In this instance, a marketing specialist travelled to Europe to personally examine the service standards and operations of a competitor who would soon be entering the local marketplace:

“[The trip to Europe] was **a bit of a sanity check just to make sure that all of our settings were still correct.**” Cameron: senior manager (C4:P3).

Concerning market intelligence's overall function, the senior manager uses the phrase ‘to make sure that all of our settings were still correct’. With this case, local survey data had provided ‘the settings’ which served to calibrate their firm's rebranding project. Subsequent market research was gathered throughout the marketing project to make sure these settings would be accurate in providing an offering to which the market would respond positively. In this case, the overseas

reconnaissance of a competitor's service ultimately justified the rationale behind updating their firm's services. The investment into market intelligence suggests, if warranted, the project's settings would adjust to suit any revised findings.

As described above, market intelligence informs the firm of the perspective of its customers, the customers' perceptions of the firm, and its competitors' movements. This information helps correct the settings or characteristics of the firm's marketing project. Market intelligence develops by various forms of market research, and the case studies suggest it is essential when determining and justifying a marketing project. The cross-case analysis showed that marketing intelligence was drawn upon at two levels. The practices identified at the (1) marketing specialist level were called calibrating, while the (2) market level practices were called prognosticating.

5.1.3.1 Calibrating at the marketing specialist level

The practices of calibrating with the market intelligence knowledge domain were found at the marketing specialist level. Calibrating describes how the marketing specialists access the market to understand its voice, feelings, and intentions and adjust the marketing project's settings accordingly. The following excerpt provides an example of how one firm adjusted their marketing project to accommodate a shift in market preferences identified since their previous survey:

“Last year we went back to the markets, to consumers with a substantial bit of [market research] which has **told us that our settings** for [a past marketing project] **are not quite right**, that **consumers have moved a little** since we last asked them about it.”
Rowan: projects manager (C2:P3).

As shown, while this firm's offering had satisfied the market's tastes in the past, recent data suggested that specific 'settings' needed changing. The marketing specialist researched how their market's tastes responded to certain characteristics and identified how tastes had changed. With this data, the marketing specialists across the cases would adjust their offering's characteristics accordingly.

In the above excerpt, the specific settings referred to by Rowan were experiential elements of their offering. However, Drew, a marketing consultant working on the same project, describes other characteristics that comprised their offering:

“There are emotional, functional and experiential parts to [our offering]... The most important aspect... is about the experience of [our offering]... **It's important for [our firm] to understand how people think and how [the firm] can implement better.**”
Drew: marketing consultant (C2:P4).

Drew argues that how their customer experiences their product is the most important element, demonstrating sensitivity toward customer responses to their offerings. Therefore, Calibrating is accessing the market's thoughts and experience toward an offering so that the marketing

project's settings might be modified in a holistically informed way. The procedures of calibrating are where market data collection tools were developed and used appropriately in order to revise each project's settings correctly:

“We’ve gone from a data set of two countries, 5,300 [respondents] in 2004 and 7 studies to a data set now based on 25 studies, 5 countries, 14,000 respondents. So **significantly deeper, richer data sets to draw our conclusions on.**” Rowan: projects manager (C2:P3).

Regarding understandings, marketing specialists understood the firm exists for the market, not vice-versa. Therefore, the project’s settings are prioritised primarily by market tastes rather than firm-centric preferences. The following excerpt shows how the marketing specialist is praised for putting the customer’s preferences first despite pressure from stakeholders:

“I think what [our marketing specialist] is very skilled at doing is **taking it back to the truth**, or taking it always back to the end user, understanding them, and not letting it be distracted between our wants but always **taking it back to the baseline of what the consumer wants.**” Kelsey: senior manager (C1:P4).

Marketing specialists established how and why the offering was valuable to the market and how to present it appropriately. Engagements describe the ends and purposes of a practice’s procedures and understandings. The following excerpt demonstrates Logan the marketing consultant’s overall philosophy of marketing and its purpose:

“The whole idea of a brand is just if you're the audience **we work out what’s important to you** and then we sell what we think you want in a way that’s palatable for you and you think meets your needs.” Logan: marketing consultant (C3:P1).

With an underlying emphasis on interpreting market intelligence, Logan provides the purpose of the marketing discipline, ‘to sell what we think you want’. However, as the following section on prognosticating shows, marketing intelligence on ‘what we think you want’, is open to degrees of interpretation.

In sum, the practice of calibrating of the market intelligence knowledge domain was found at the marketing specialist level. Calibrating describes how the marketing specialists access the market to understand its voice, feelings, and intentions and why they adjust the marketing project's settings accordingly. Across the cases, the marketing specialists carried out various forms of market research in order to determine their target audience's inclinations or changes in their preferences. The primary purpose of their research was to optimise their marketing project’s settings. When drawing on this practice, the marketing specialists could calibrate the marketing project more objectively by using their market’s voice, research, and expert opinion to govern the marketing project’s settings. In brief, the calibrating practices of the marketing specialists at the marketing specialist level was crucial in aligning their marketing project’s settings to satisfy their market’s preferences.

5.1.3.2 Prognosticating at the market level

At the market level, the marketing specialists drew practices from the market intelligence knowledge domain when prognosticating their marketing project's settings. Prognosticating is the testing, predicting, or anticipating market responses to potential, proposed, or actual marketing actions, to validate the firm's current or decide future marketing manoeuvres. In each of the cases, senior managers complained that they suffered from both a lack of market research and the presence of market turbulence. Therefore, marketing specialists practised prognosticating to help guide their firms' manoeuvres. In cases where market research was conducted, the marketing specialists were able to prognosticate, or move forward with greater confidence. For example, an analysis of market data revealed to the following firm that a certain type of offering would be successful with current and targeted markets:

“So that **you can map it out** and there's a gap between the two lines is clear to see. Empirical evidence that suggests that [this type of offering] **extends the life of our relationship with those customers.**” Tristan: senior manager (C3:P2).

Using data to identify and analyse a particular market trend, Tristan a senior manager describes a customer behaviour that strongly suggests a way to capture further market share. Concerning prognosticating, this market intelligence provided stimulus to instigate a major marketing project. As well as prognosticating for the short term, other case studies showed that marketing specialists also considered the medium and long term as well:

“The other thing to consider is **the market mix is changing.** The markets where [our firm] is distributing [its offerings] change, increase, decrease. So, ...we've been going to the most important markets for [our firm] is basically **today, and we think in the future and the near future.**” Drew: marketing consultant (C2:P4).

Here, Drew showed concern with how the market would develop soon and in the longer term. Due to market turbulence related to competitor activities, the firm continually re-visits the markets in which they operate. Moreover, the firm also continuously investigates other countries that they consider potential markets. Hence, an essential attribute of prognosticating is assessing the advantages in the market and the subsequent direction in which the firm might move. The procedure across cases was that marketing specialists knew that their research questions, methods, partners, and agenda were critical to garnering data that provided an authentic gauge of the market:

“What I've found so fantastic about our research partners and the marketing spaces, is really getting to the heart, prior to conducting the research, of **what questions do we need to answer? Not what outcome are we trying to prove.**” Peyton: marketing specialist (C2:P1).

As Peyton indicates, prognosticating requires an impartial, objective, and sensitive approach to gain meaningful data and produce credible findings. Hence, regarding understandings, the marketing specialists first determined the market's or end user's preferences. Therefore, in light

of the firm's objectives, the marketing specialists sought input from experts for current as well as future possibilities or trends:

“We have to stay current, we have to stay relevant for consumers, so what does that mean? Understanding what we want to achieve as a business, getting in the market to **talking to consumers to better define that**, and then being able to **sit in a room [of stakeholders whose expertise is] going to have some connection or relevance in 20-30 years.**” Peyton: marketing specialist (C2:P1).

As Peyton further points out, they engaged with the end-user in order to ascertain their perspectives regarding their current context. The next step was to develop competitive advantages by reviewing the findings with subject-matter experts. By gathering, processing, and acting upon market intelligence, the marketing specialists were further equipped to prognosticate toward a more successful marketing project. As the following excerpt demonstrates, feedback from customers showed that the marketing specialists’ prognosticating navigated their firm’s marketing project toward a largely successful outcome:

“I’m seeing a **much higher proportion of positive [social media] feedback** in terms of the rebrand... I’m get a lot more success stories coming in.” Hadley: marketing executive (C4:P4).

The practice of prognosticating was identified as how marketing specialists use their market intelligence at the market level across the cases investigated. As shown, prognosticating is testing, predicting, or anticipating market responses to potential, proposed, or actual marketing actions, to validate the firm's current or decide future marketing manoeuvres. In each case, the marketing specialists would collect and study market data and examine it for changes or trends in areas such as their target audience's preferences, competitors' offerings, or market turbulence. From their findings, the marketing specialists anticipated how to respond and make educated guesses as to the effect their response would have on their target audience and competitors. Here, the marketing specialists' ‘guesses’ are more credible than the guesses of other personnel due to the project and market immersion their role afforded them. As discussed, prognosticating at the market level required specific procedures, understandings, and engagements carried by experienced marketing specialists. To sum up, prognosticating at the market level was practised by the marketing specialists to anticipate their marketplaces' response to various scenarios brought about by changes in their project's settings.

To summarise, market intelligence is defined as knowledge comprised of formal and informal insights into current and anticipated market needs and movements and includes competitor activities (Hattula et al., 2015; Kohli & Jaworski, 1990; Maltz & Kohli, 1996). As discussed, market intelligence and its practices of calibrating and prognosticating, drawn upon at the project and market levels respectively, were vital functions of the marketing specialists’ knowledge. Together, these practices aimed to sense market change or sentiment and recommend to their firm the appropriate responses. Both calibrating and prognosticating were

comprised of procedures, understandings and engagements which provided further insight into what constituted their market intelligence. By using research methods to determine the market’s voice to shape their project’s settings, the marketing specialists mitigated stakeholders’ sentiment-based preferences thereby increasing confidence in their respective marketing projects. As a knowledge domain, market intelligence appears to be relatively distinct to marketing specialists; however, the mental profiles of the market it accumulates needed refreshing over time. Here, the marketing specialists were aware they required constant updates of market intelligence due to the ever-changing nature of the marketplace. As a specialist knowledge domain, market intelligence proved both decisive and beneficial to each of the firms investigated. The knowledge domain of market intelligence, its two practices, and each of their the procedures, understandings, and engagements are summarised in Table 5.1.3.

Table 5.1.3: Market intelligence knowledge domain by constituent practices.

		Practices are constituted by:		
		Procedures	Understandings	Engagements
		Def. Explicit rules, principles, precepts, and instructions, what is sometimes called discursive ‘know-that’ knowledge.	Def. Knowledge of what to say and do; skills and projects, sometimes called ‘know-how’ (i.e., tacit cultural templates for understanding and action).	Def. Linking ends, means, and moods that govern what makes sense to do beyond the procedures and understandings.
Knowledge domain: market intelligence	Marketing specialist	Calibrating Def. Accesses the market to understand its voice, feelings, and intentions and adjusts the marketing project’s settings accordingly.	Market data collection tools were developed and used throughout the project’s process in order to manage each project’s settings.	Marketing specialists understood the firm exists for the market, not vice-versa. Therefore, the project’s settings are determined primarily for the market, rather than firm-centric, preferences. As well as understanding what the market wants, marketing specialists worked out how and why the offering was valuable to the market and how to present it appropriately.
	Market	Prognosticating Def. Testing, predicting, or anticipating market responses to potential, proposed, or actual marketing actions to validate the firm’s current or decide future marketing manoeuvres.	Marketing specialists knew that their research questions, methods, partners, and agenda were critical to garnering data that provided an authentic gauge of their market.	Marketing specialists first determined market or end-user preferences, then, in light of the firm’s objectives, the marketing specialists sought input from experts for current as well as future possibilities or trends. The marketing specialists engaged with the end-user in order to ascertain their perspective regarding developments in their environment, so that they might acquire cogent intelligence and competitive advantages.

5.1.4 Leadership

Leadership is defined as a process whereby an individual influences a group of individuals to achieve a common goal (Northouse, 2012). The knowledge domain of leadership provided some interesting insights into the relationships between marketing specialists and others within and external to their respective firms. For instance, despite being middle management the marketing specialists influenced their boards', senior managers' and personnel's decisions and behaviour to align their firm toward their projects' objectives. Hence, their hierarchical status and obligations to the firm placed the marketing specialists in a peculiar leadership role:

“I was so conscious that you **can't lead people to the answer that you want**, or the answer that you think is right.” Casey: marketing specialist (C4:P1).

Fundamentally, the marketing specialists understood that they could not only impose their plans upon other personnel, senior or otherwise, the way a senior manager might. In other words, the marketing specialists typically were not able to lead productively by employing hierarchical, coercive, or reward power. Instead, the data shows that they adopted certain practices in order to lead effectively. These practices led marketing specialists to adopt an appropriate management attitude, approach, or tone when addressing others, in order to accomplish their projects' aims. The marketing specialists' circumstances or task at hand determined the most effective practices to engage with. For example, the following excerpt from a senior manager discusses how critical his marketing specialist's ability to interact with others needed to be if they were to lead them:

“I think you can have all the education under the sun **but if you don't deliver it well... understanding the people factor**, you can be all great in theory but in the practice of it, it can be all wrong.” Kelsey: senior manager (C1:P4).

As the senior manager claims, leadership is critical; regardless of its concept and theoretical cogency, an incapable leader is likely to scupper a marketing project. Overall, the study found that marketing specialists assumed either facilitating or arbitrating practices when leading. When facilitating others, the marketing specialists typically employed a collegial approach toward others. The following excerpt provides an example of a facilitative leadership style:

“**My role is about basically forming the story**, the information; to go out to [stakeholders] to say, ‘Here's why [this marketing project] is important, this is what the market's telling us, here's what we think we should be doing to achieve that, here's what tools that are in the pipeline for you to be able to achieve this to give the consumer what they want.’” Rowan: projects manager (C2:P3).

Although Rowan is described above as a projects manager, his role might also be described as a firm's internal marketing specialist. As shown, Rowan takes a facilitative tone by educating stakeholders on market-led drivers, the available tools, and the need to respond to the market's

voice appropriately. In this instance, Rowan led stakeholders by stimulating their business-sense toward achieving marketing objectives. In other words, the stakeholder was facilitated, rather than commanded, toward a common goal. In contrast, the excerpt below describes how Casey a marketing specialist adopted a more arbitratative tone:

“[Despite my recommendation] there was one person who wanted to keep [a previous firm policy]... You've got to be true to what we are trying to create, how the market is thinking... And it got pretty heated.. **we just went ‘No’. You back this process, and the process says going forward ‘You don't do it.’**” Casey: marketing specialist (C4:P1).

In addressing a resistant board member, Casey adopted direct and commanding leadership tone, despite the board member’s senior role. In this example, the marketing specialist used the voice of the market to justify a change of policy to align the firm with customer expectations. Across the cases, the marketing specialists used a combination of the market’s voice and the robustness of market analyses to justify their arbitratative practices, regardless of their stakeholder’s seniority.

Understanding and adopting the appropriate leadership practices available to the marketing specialists was vital. Even though the facilitating and arbitrating practices of the marketing specialists were found across each case, their usage was determined by their context. In each case, some marketing specialists showed more of a facilitating approach throughout their project, while others required more arbitrating practices. Hence, the practices of leadership were identified as (1) facilitating and (2) arbitrating, which operated at the firm level among the board, senior management, colleagues, personnel, and stakeholders. In sum, while all the marketing specialists appeared capable of displaying both practices, it was recognised that the style and intensity of their leadership practices were context-driven.

5.1.4.1 Facilitating at the firm level

Facilitating is one of two practices of marketing specialists across the cases at the firm level, which was adopted to lead staff and stakeholders toward a specific goal. As a practice, facilitating is described as positioning oneself collegially in the organisation’s marketing process in order to assimilate and empower latent and expert human resources. The marketing specialists facilitating the voice of the firm would simultaneously generate persuasive internal brand messages and approval toward their adoption. Therefore, when leading others in this capacity, the marketing specialists drew upon certain procedures, understandings, and engagements. Concerning procedures, the marketing specialists knew that in order to gain support for the marketing project, input from relevant stakeholders at each level of the firm would be required:

“We did the first [**brand workshop**] **with the management team**, and we did one with **the board** as well... And we started developing a bit of a hypothesis around some

values and what we stand for and where we're placed in the market. And then we went out and we ran workshops **with groups of [personnel around the country]**.” Logan: marketing consultant (C3:P1).

In the above example of facilitating, it is important to note that a marketing specialist instigated the project itself. The marketing specialists consulted with senior management who approved and paid for the project, and with the frontline staff who would be carrying out the firm's new cultural values. In other words, the marketing specialist understood how to identify and distil a strong internal branding message from the voice of the firm and use it to orient the firm:

“After the workshops, they [the marketing specialists] pulled together everything they have heard and came back to us and said ‘This is what we have heard and **based on that, we think this is the right direction.**’ So **they did at that point provide us with direction and leadership.**” Corey: senior manager (C3:P4).

Therefore, concerning engagements, by listening to people in the firm, the marketing specialists achieved an accord with personnel to achieve certain standards and objectives. During the workshops, the marketing specialists were surprised and impressed by the responses given by participants in the workshops and worked to acknowledge each of the ideas given. In the above case, the outcome of the internal marketing process consisted of both verbatim phrases that arose in the workshops and a mash-up of related and consistent ideas. Accordingly, despite the preference for brevity and clarity with internal marketing messages, much of the input and ideas from stakeholders at all levels were recognised in their project's settings. In other words, the marketing specialists' facilitating practices had them engaging with stakeholders in a mutually beneficial and respectful way:

“You had an absolute prime and ripe workforce to work with because people love being put in the situation where they have got a chance to talk about the business they work in. And **they get listened to and their input is going to be valued.**” Logan: marketing consultant (C3:P1).

While attempting to institute firm-wide changes carries risk, marketing specialists knew that taking a facilitating approach was likely to yield several benefits. First was the likelihood that the marketing ideas that emerged in a facilitative environment, such as a workshop, were going to be relevant to, and more readily understood, by stakeholders. Further, some suggestions provided by frontline staff needed no further refining by the marketing specialists and were adopted verbatim as cultural benchmark headlines or marketing taglines. Another benefit was that the decisions on cultural and marketing changes made by personnel were more likely to be accepted and ratified than those prescribed by senior management. Moreover, in reality, the service standards recommended by personnel on several issues required them to provide higher services levels than senior management could have confidently mandated. Therefore, adopting a facilitating approach precipitated the relevance, acceptance, and high level of cultural and behavioural change that met or exceeded senior managements' and the marketing specialists' expectations.

In sum, the practices of facilitating categorise one of the two aspects of the marketing specialists' knowledge domain of leadership identified at the firm level across the cases. Facilitating is described as positioning oneself collegially in the organisation's marketing process in order to assimilate and empower both latent and expert human resources. Here, the marketing specialists held workshops and conversations with personnel to garner viable and pertinent feedback to develop both relevant settings and consensus with each project. The practices of facilitating differ with the practices of consolidating identified within the marketing expertise knowledge domain due to facilitating's emphasis on building consensus. In other words, when consolidating at the firm level, the marketing specialists focused on the appropriacy of their marketing projects' settings across the firm. However, in their leadership role, the marketing specialists' facilitating approach is more concerned about garnering their personnel's input, and therefore their advocacy, toward the project. The role of facilitating was essential to each project but not equally. The InterCity Group, for example, relied heavily on running workshops with their franchise partners' drivers and personnel in depots across New Zealand. On the other hand, while TBOP engaged with tourism operators and stakeholders, TBOP were not as reliant on their input, consent, or adoption of the marketing project. As shown, the practices of facilitating were constituted with procedures, understandings, and engagements, which were singular to the marketing specialists. In short, the facilitating practices of the marketing specialists used collaborative methods to garner the perspectives of stakeholders which were aimed at building consensus toward the marketing project and its objectives.

5.1.4.2 Arbitrating at the firm level

As mentioned, arbitrating was the second of the leadership practices derived from the case data, which was also identified as being effective at the firm level. Arbitrating is where the marketing specialist assumed a commanding, mentoring, or adjudicating role within the organisation for the sake of marketing progress. Across the cases, the arbitrating practices of the marketing specialists appeared to take effect when the marketing project came to a standstill, or to settle differences between stakeholders. In several instances, the marketing specialists knew that they lacked directive power from a personal or hierarchical position. However, by using expert opinion, tried and true marketing principles or tools, or the voice of the market, the marketing specialists influenced other personnel and stakeholders:

“It's **translating market signals back** to the [stakeholder] and **trying to drive [stakeholder] behaviour** to deliver what the market wants.” Rowan: projects manager (C2:P3).

As shown, the marketing specialists were able to motivate others using the results of market research. On the other hand, the marketing specialists also used their own expertise, or the expertise they had learned from others, to lead others. For example, the following excerpt

demonstrates how a marketing manager's expertise was used to direct her senior manager and thereby orient the marketing project processes:

“[Our marketing specialist] would **very clearly state the path in which we needed to go** to get there; first, we need to understand this before we can do this. **She would clearly lay the path down.**” Kelsey: senior manager (C1:P4).

While marketing specialists were sometimes very direct in their arbitrating practices, at other times they used more subtle methods to lead their stakeholders toward aligning with their marketing project. For example, a marketing specialist describes how shepherding stakeholders into listening to the market's voice proved an effective strategy to influence their thinking:

“It's not just about me saying, ‘We know’ ... **It's about showing [stakeholders] the research and ideally getting them in the market** so they can sit in a qualitative focus group **so they can hear the discussion to drive their thinking.**” Peyton: marketing specialist (C2:P1).

Concerning procedures of arbitrating, marketing specialists knew that they lacked directive power from a personal or hierarchical position. However, by using robust research findings, marketing principles, or expert opinion, they could persuade and direct stakeholders appropriately. Hence, concerning understandings, as the marketing specialist was skilled in marketing principles, tools, and resources, they were able to direct their firms in adopting appropriate pathways. Regarding engagements, although the marketing specialists employed expert or referent power, evidence suggests they also used indirect methods to orient the firm, with the ends justifying the means of influence.

In sum, the practice of arbitrating categorises one-way marketing specialists employ their leadership at the firm level across the cases. Arbitrating describes how the marketing specialist assumed a commanding, mentoring, or adjudicating role within the organisation for the sake of marketing progress. As shown, the practices of arbitrating were not necessarily authoritarian, but the marketing specialists were leading stakeholder decision-making using a variety of levers available them. These levers included the voice of the market, market research, expert opinions and sound marketing practices and principles, which helped convince stakeholders to cede to the marketing specialists' recommendations. Therefore, using these levers, the marketing specialist could direct stakeholders and orient the firm toward achieving the firm's marketing objectives.

To summarise this section on leadership, leadership is defined as a process whereby an individual influences a group of individuals to achieve a common goal (Northouse, 2012). Findings suggest the practices of marketing specialists' leadership are found across the firm level and have been titled facilitating and arbitrating. Consistent with practice theory, these practices were made up of procedures, understandings and engagements, each of which provides further insight into the constitution of the marketing specialists' leadership practices.

Despite their mid-level posts, the marketing specialists required influence over senior managers and board members, as well as stakeholders and personnel, many of whom were unfamiliar to them. To meet these challenges, the marketing specialists' leadership practices leveraged expert opinion, robust marketing processes, and their market's stated preferences to exert influence over their marketing project's resources and settings.

Further, the marketing specialists to one degree or another created opportunities for their personnel and stakeholders to provide their influence upon, and therefore their advocacy toward, the marketing project's settings. Therefore, as specialist knowledge, Leadership provided an indispensable contribution to each of the cases investigated. The practices of the leadership knowledge domain are summarised in Table 5.1.4.

Table 5.1.4: Leadership knowledge domain by constituent practices.

		Practices are constituted by:			
		Procedures	Understandings	Engagements	
		Def. Explicit rules, principles, precepts, and instructions, what is sometimes called discursive 'know-that' knowledge.	Def. Knowledge of what to say and do; skills and projects, sometimes called 'know-how' (i.e., tacit cultural templates for understanding and action).	Def. Linking ends, means, and moods that govern what makes sense to do beyond the procedures and understandings.	
Knowledge domain: Leadership	Firm	Facilitating Def. Positioning oneself collegially in the organisation's marketing process in order to assimilate and empower both latent and expert human resources.	In order to gain support for the marketing project, input from relevant stakeholders at each level of the firm would be sought.	The marketing specialist knew how to identify and distil a strong internal branding message from the voice of the firm and use it to orient the firm.	By listening to people in the firm, the marketing specialists captured the firm's allegiance to achieve certain standards and objectives.
	Firm	Arbitrating Def. Assuming a commanding, mentoring, or adjudicating role within the organisation for the sake of marketing progress	Marketing specialists knew that they lacked directive power from a personal or hierarchical position. However, by using referent and expertise power, they conveyed a strong and directive potency to direct stakeholders.	By understanding and using expert opinion, marketing principles, and the voice of the market, the marketing specialist was able to orient the firm directly.	Although they employed expert or referent power to orient the firm, marketing specialists advocated that stakeholders make up their minds regarding aligning themselves with the project's purposes.

5.1.5 Life experiences

Along with their acuity in marketing principles, their firms' and markets' composition and context, and their leadership, the marketing specialists' life experiences also influenced their project's settings. Life experiences are described as consisting of one's values, personal skills, and talents which help with ways of understanding how things and people are linked (Reckwitz, 2002; Skålén & Hackley, 2011). As discussed in Chapter 4, the knowledge domain of life experiences was identified at the marketing specialist, firm, and market levels. Analyses across the cases showed that life experiences mingled with other knowledge domains of marketing specialists to ensure their marketing projects resonated rationally and emotionally with their target audience. For example, Lane the marketing consultant describes how marketing work is holistic, in that it includes one's professional and personal experiences and capabilities:

“You bring all your experience of, not only advertising, but **of life and people and human interaction and the world**, and you bring that knowledge to a task.” Lane: marketing consultant (C3:P5).

As Lane points out, as a marketing consultant, he includes his experiences 'of life and people, and human interaction and the world' in his work. Analyses strongly suggest marketing specialists draw from their life experiences to help them both conceive and develop a marketing project, and relate with others on the project too. Moreover, life experiences appear to humanise the characteristics of an offering, thereby further improving its resonance with audiences. In other words, while marketing tools and principles were required for projects, the marketing specialists sufficiently consider the 'people factor'. To further illustrate, a marketing consultant from another case often drew from particular life experiences when presenting to or managing a group of people:

“I used to perform for a living, I used play in a rock and roll band for ten years so I'm not shy. I can stand up in front of group of people, whether it's the management team at a big corporate or a bunch of guys in a factory, and I'm not anxious or nervous, **I'll just bring it down to earth and facilitate a conversation.**” Logan: marketing consultant (C3:P1).

Through experience, Logan has developed confidence and the ability to relate to an audience. While the marketing consultant is fluent in marketing and business theory compared to the 'guys in the factory', his erudition is not an obstacle when communicating marketing concepts with them. In short, life experiences have taught the marketing consultant ways in which to connect with others capably. In a separate example, another marketing specialist's (C3:P3) life experiences was completing a biochemistry degree at Oxford and working with a Nobel Prize winning biochemist. While a connection between this particular life experience and its contribution to their marketing project was not explicit, one or more influences from their academic training cannot be ruled out. The following excerpt from another marketing specialist

describes how a period in his life helped shape his understanding of marketing, market-sensing, and what motivates people:

“So [my backpacking days] were all to do with people. They were **all about understanding what was going on in my environment. And taking things in and using them to your advantage**, I think. To be honest, I think **marketing is really about that. It's being observant. It's understanding and getting a sense of what the need is** and creating a message that fulfils that need... understand what motivates people and what doesn't.” Casey: marketing specialist (C4:P1).

Life experiences have provided this marketing specialist with an understanding or sense of one's environment and what motivates others. These lessons also appear to inform the marketing specialists of the necessity to communicate effectively. In brief, life experiences taught marketing specialists about utilising resources within their environment, interpreting people's motives, and forming messages that resonate with others.

Life experiences, such as performing, backpacking, and human interaction acquainted, equipped and reminded the marketing specialists of the human factor in their marketing pursuits. These lessons included confidence in how to connect with others, as well as to understand human nature and to be observant of one's surroundings. While marketing expertise and other practices are essential, life experiences are described as adding a holistic, humane resonance to the marketing specialists' suite of practices, rounding off any too-theoretical leanings. The cross-case analysis showed life experiences were comprised of practices that operate at all three levels: the marketing specialist, the firm, and the market levels. Therefore, the practices identified at the respective levels were (1) finessing, (2) fraternising, and (3) resonating.

5.1.5.1 Finessing at the marketing specialist level

Finessing is the term given to practices identified within the life experiences knowledge domain across each of the cases at the marketing specialist level. The practices of finessing describe how marketing specialists apply non-marketing experiences to add artful subtleties or nuance to a marketing project. When finessing a project, the marketing specialist makes sure that the project is more than theoretically sound, that the project will connect emotionally with the target audience. Regarding procedures when finessing, the marketing specialists drew from precepts developed by environmental, social, material, and value-based experiences and brought them to bear on their projects. The following excerpt describes how a marketing consultant, when selecting a promotional photo, draws from his life experiences to ascertain the effective interpretation his audience might take from it:

“What we do as creators is we take those [marketing collateral photos] and actually **make sure that they've got emotion in them...** What's their facial expressions? What are they wearing? What are the messages that they are conveying that comes out of that? So **it's more than emotional queues that we put in.**” Kelly: marketing consultant (C1:P2).

The marketing consultant explained that when developing the promotional material for a project, the marketing specialists discussed with one another the possible emotional responses to visual cues in photos. These emotional responses are understood primarily through their self-awareness, self-concept, and social equivalents. Therefore, details within the project were refined by the marketing specialists' understandings of appropriate sociocultural manners and matters:

“So that’s a constant evolution of very small things, and that happens all the way through. **That’s honing.**” Lane: marketing consultant (C3:P5).

Lane comments that the marketing project is subject to finessing, or ‘honing’, throughout its developmental phase. These unfolding alterations ensure the marketing project has emotional elements that will have maximum impact when released. As the engagements of finessing describe, messages embedded within the project were calculated to prompt emotive reactions from the target audience. For example, despite being a commodity-type offering, the marketing specialist tasks themselves with imbuing their product with a personality:

“So when we started off talking about [**our offering] being a low emotional engagement factor**. If we can **create a bit more personality** in our advertising and marketing communications, for me, that is a very positive thing.” Piper: marketing specialist (C3:P3).

As the comment shows, despite the firm’s offering suffering a naturally low appeal, the marketing specialists aimed to infuse it with characteristics designed to make it more endearing. By doing so, the marketing specialists hope to create a causal sequence in which the promotion creates an emotive response, a memory, and finally recognition in their target market’s mind. This causal sequence is critical when sales teams or further promotional material make contact with their audiences in order to convert them into customers.

In brief, finessing was the practice identified where marketing specialists injected, tuned, or ‘honed’ the marketing project settings with affective cues to generate emotive responses from typically uninterested audiences. Finessing describes how marketing specialists apply non-marketing experiences to add artful subtleties or nuance to a marketing project. When finessing their project, the marketing specialists considered each other's perspectives on how their audience would interpret various marketing projects' settings. As shown, finessing marketing projects' settings required specific procedures, understandings, and engagements which were shared among experienced marketing specialists. Moreover, the practices of finessing were essential as missteps or miscues in injecting affective cues would likely have negative effects on subsequent branding and sales results.

5.1.5.2 Fraternising at the firm level

Fraternising was a life experience practice identified at the firm level across each of the cases. Fraternising describes how marketing specialists leaned upon their life experiences to conduct themselves in a manner which encouraged interaction with the organisation's personnel and stakeholders. Although leadership practices such as facilitating and arbitrating were identified at orienting the firm level, the life experiences practices of fraternising were also found to be effective because of their relational qualities:

“So it's project management, it's financial management and **it's diplomacy and it's building relationships** as well, and that was a key thing.” Piper: marketing specialist (C3:P3).

Despite business objectives driving marketing projects, Piper emphasises the importance of ‘diplomacy and... building relationships’, suggesting that fraternising is critical at the firm and stakeholder level. In procedural terms, the marketing specialists knew that personality was effective in building relationships and linking appropriate resources throughout the firm for the project:

“[Our marketing specialists] is a very good connector. She has been **connecting with the right people to do that [project]**.” Drew: marketing consultant (C2:P4).

As the marketing consultant points out, one of the marketing specialist's strengths during their project was sourcing suitable human resources, whether external or internal and connecting them to the firm. As the nexus of multiple connections throughout the marketing project, the marketing specialists understood how to manage people, objectives, and garner consensus throughout the projects' lifespan:

“I remember my boss saying to me that one of my skills was **I could get a group of people that didn't want to be there** and, through a day, work with them to help them to sort of agree on what we're doing.” Logan: marketing consultant (C3:P1).

As the marketing consultant suggests, skills at mixing with non-acquaintances and eventually unifying them had been identified as a natural core competency. With regard to engagements, Carter the marketing specialist leans on life experiences to overcome a trend in the industry to disconnect relationally with third-party agencies. In contrast, Carter seeks to partner with stakeholders who care about their clients:

“**How to work with agencies, and that's not something that is taught well** these days... to the detriment of the relationships. So **there's a lot of supplier mentality going on**; that the agency's just a supplier; where you really need partners and they need to be deeply passionate about the brand, and that only comes if you're nice to them. But not to the point where they have control, but **there needs to be a really nice relationship there – symbioism**.” Carter: marketing specialist (C1:P3).

Despite the tendency in business to disassociate with its agencies, Carter developed a symbiotic and mutually beneficial relationship by eschewing the ‘supplier mentality’ and by being friendly to them instead. Although Carter maintains the necessary control over the project, she aims to develop ‘a really nice relationship’ with her agencies for the sake of progress. In brief, the practices of fraternising at the firm level were vital in supporting the success of the marketing project.

In brief, fraternising was a practice identified when marketing specialists apply their life experiences at the firm level across the cases investigated. When fraternising, marketing specialists leaned upon their life experiences to conduct themselves in a manner which encouraged interaction with the organisation's personnel and stakeholders. Within each case, it was essential that the marketing specialists connected cordially with stakeholders and personnel. In one case, the marketing specialist was described as having the attributes of a ‘chameleon’. As reported, practices of fraternising required procedures, understandings, and engagements shared among experienced marketing specialists. Based on the findings, the practices of fraternising imbued relational qualities which assisted in connecting and smoothing interactions with personnel throughout the changes and disruptions their marketing projects introduced.

5.1.5.3 Resonating at the market level

At the market level, the practice of resonating was identified across the cases. Resonating is described here as marketing specialists provoking a behavioural response from their audience due to their project’s settings having pitched to a germane or sentient human affectation or motive. To reach their objectives, marketing specialists across the cases strove to develop a marketing project with subtle and dexterous elements designed to resonate with and compel their audiences to action. For their offering and aspects of its marketing mix to resonate with its audience, the marketing specialists would draw from their own life experiences to evaluate the emotive responses their projects’ settings. However, due to the subjectivity of audience response, the marketing specialists could only guess at how their project would influence their market. However, after their projects’ respective launches, the marketing specialists and others from the firm would determine how it resonated with the market. The following excerpt describes how one marketing project resonance was measured:

“[The] ad is designed to be a couple of likeable people telling us a warm story that communicates warmth and care, but does it in a memorable way that people like, and from what we have seen, I think we have got well over 100,000 YouTube views and **it does appear that the ad is achieving that.** But research on the cut-through of the message is that it is actually much better than [the advertisement] we did last time.”
Corey: senior manager (C3:P4).

In determining whether or not the project resonated with the market, Corey considered three main elements. First, do the characters, the setting, mood, and plot of the advertisement, which were determined by the marketing specialist, resonate with the audience? Next, how many

'views' to the advertisement did the target audience make? Third, and following on, what is the 'cut-through', i.e., the positive response by the target audience to the advertisement's message? Corey infers that the resonance the marketing project had on the target audience was an important appraisal criterion determining how successful the project was. Also inferred by the senior manager concerning 'cut-through', were the sales volumes that were a direct result of their advertising. As with each of the practices discussed in this chapter, resonating is constituted by procedures, understandings, and engagements. Regarding procedures, marketing specialists knew that a wealth of life experiences provided confidence that projects were more likely to impact their market:

“Well, **we know [the messaging in the project] was a good idea**, we knew that if it worked properly that we would **get that emotional engagement** and people would like it.” Piper: marketing specialist (C3:P3).

Here, the marketing specialist was confident that emotional messaging was the right approach. However, by Piper's phrase 'if it worked properly', one might conclude that procedures that cause the audience to resonate with a marketing project's message are never guaranteed. However, life experiences are likely to increase the degree of confidence and success in marketing projects achieving a resonance. This correlation is partly because marketing specialists experience life themselves as consumers and the target of marketing projects. For example, marketing specialists understood and respected the market as being difficult to motivate. Therefore they understood their offering needed an emotional draw and, after putting their minds to it, developed ways to motivate their target market:

“You're never going to wrangle customers; **customers are too cynical and too smart, too difficult**. All you're ever going to do is influence them and **try and pull on their heartstrings**.” Logan: marketing consultant (C3:P1).

Regarding engagements, the marketing consultant had faith that marketing projects can be designed to motivate an apathetic target audience. Therefore, despite the other merits of each offering across the cases, the marketing specialists also believed their projects needed to resonate at a personal level with the target audience:

“[A major New Zealand CEO] tweeted [our new television commercial] on the night.. So he tweeted it to all his 80,000 followers on the night that it aired, with **the message going 'Ohhhhh'**. **So obviously it resonated with him**.” Corey: senior manager (C3:P4).

The marketing consultant's comments regarding emoting their audience, along with Corey's Twitter anecdote, suggests that embedding resonance within their marketing project is crucial. Hence, by applying their life experiences to the settings of each of their marketing projects, the marketing specialists aim, albeit hope, is to reach past the 'cynicism' that advertising can cause. Simultaneously, having disarmed a cynical response, the marketing specialists also hope that their offering and its promotional material, its taglines, characters, and settings, for instance,

will resound with its audience. In doing so, the marketing specialists believe that the sales volume of their goods and services are more likely to increase.

In sum, resonating was a life experience practice identified at the market level across each of the cases. To define resonating, marketing specialists aim to provoke a behavioural response from their audience due to their project's settings, having pitched to a germane or sentient human affectation or motive. Using their own experiences, the marketing specialists considered how their audience would respond to the messages, images, prices, and other aspects of their offering's marketing mix. Similarly, the marketing specialists would also test and measure the actual responses of their audiences post-launch. Therefore, the practices of resonating at the market level were vital in projecting the right 'look and feel' of each marketing project. As shown, the practices of resonating at the market level were constituted by procedures, understandings, and engagements across each of the cases. In brief, the practices of resonating at the market level were crucial in 'humanising' each project, short-circuiting cynical responses to advertising, and maximising the potential sales volume within each market.

Overall, life experiences are described as consisting of one's values, personal skills, and talents which help with ways of understanding how things and people are linked (Reckwitz, 2002; Skálén & Hackley, 2011). As shown, life experiences' practices are comprised of finessing at the marketing specialist level, of fraternising at the firm and stakeholder level and resonating at the market level. Consistent with practice theory, each of these practices was composed of procedures, understandings and engagements, each of which described further how marketing specialists' life experiences are constituted. Life experiences merged with other marketing specialist knowledge domains to bring holistic and humane attributes to help arrange the success of each of the marketing projects investigated. Due to the wide variety of backgrounds and life experiences of each marketing specialist, this knowledge domain can bring similarly wide influences to a marketing project's settings. Therefore, as a marketing specialist knowledge domain, life experiences provided both crucial and unique contributions to each project's settings across the cases investigated. The attributes of the life experiences knowledge domain and its practices are summarised below in Table 5.1.5.

Table 5.1.5: Life experiences knowledge domain by constituent practices.

		Practices are constituted by:			
		Procedures	Understandings	Engagements	
		Def. Explicit rules, principles, precepts, and instructions, what is sometimes called discursive 'know-that' knowledge.	Def. Knowledge of what to say and do; skills and projects, sometimes called 'know-how' (i.e., tacit cultural templates for understanding and action).	Def. Linking ends, means, and moods that govern what makes sense to do beyond the procedures and understandings.	
Knowledge domain: Life experiences	Marketing specialist	Finessing Def. Applying non-marketing experiences to add artful subtleties or nuance to a marketing project.	The marketing specialists drew from precepts developed by social, material, and value-based experiences and bought them to bear on their projects.	Details within the project were refined by understandings of pertinent sociocultural manners and matters.	Messages embedded within the project were calculated to prompt emotive reactions.
	Firm	Fraternising Def. Conducting oneself in a manner which encourages relations with the organisation's personnel and stakeholders.	The marketing specialist's personality was useful in building relationships and linking appropriate resources throughout the firm for the project.	As the nexus of multiple connections throughout the marketing project, marketing specialists understood how to manage people, objectives, and consensus during the project process.	Marketing specialists sought to partner with stakeholders who care passionately about their firm.
	Market	Resonating Def. Marketing specialists provoked a behavioural response from their audience due to their project's settings, having pitched to a germane or sentient human affectation or motive	A wealth of life experiences provided confidence that projects are more likely to be effective despite low levels of market data in some cases.	Marketing specialists understand that the market is difficult to motivate. The offering needs a draw.	Despite the merits of each offering across the cases, projects needed to engage and resonate at a personal level with the target audience.

5.1.6 Summary of marketing specialist knowledge

Based on a review of marketing and management literature, this research proposed that specialist marketing knowledge can be categorised within specific knowledge domains. These domains comprised of marketing expertise, organisation familiarity, market intelligence, leadership, and life experiences. Cross-case analysis from four case studies suggests that these categories, although broad, are comprehensive and populated by practices identified at the marketing specialist, firm and market levels. In the above section, each knowledge domain and

their constituent practices at either the marketing specialist, firm, or market level were discussed, along with each practices' procedures, understandings, and engagements. On the following page, Table 5.1.6 provides an overview of the practices that constitute each knowledge domain at their appropriate level/s.

Table 5.1.6: Summary of marketing specialist knowledge domains and their practices by level

Knowledge domains	Level	Practices	Description
Marketing expertise Knowledge regarding the development, implementation, and control of marketing solutions, strategies, and policies.	Marketing specialist	Conceptualising	> Marketing specialists engaged each other's cognitive, research, and material resources to help ascertain, develop and decide a marketing projects' settings
	Firm	Consolidating	> Enlisting the firm's personnel and material resources to develop, innovate, and embed the marketing projects' settings.
	Market	Championing	> Targeting, brandishing, timing, supporting, reinforcing, and defending the marketing project's settings toward optimisation and maturation.
Organisation familiarity Knowledge of the firm's personnel, branding, structure, culture, stakeholders, resources, capabilities, strategic intent, identity, products, offerings, and commercial setting.	Marketing specialist	Anchoring	> Marketing managers upheld their understanding of their firms' branding, resources, and objectives against other marketing specialists' creative input or proposals.
	Firm	Ingraining	> Widening and deepening one's understanding of and engagements with, and accountability to their firm and its goals, as well as its stakeholders, and industry.
Market intelligence Formal and informal insights into current and anticipated market needs and movements and includes competitor activities.	Marketing specialist	Calibrating	> Accesses the market to understand its voice, feelings, and intentions and adjusts the marketing project's settings accordingly.
	Market	Prognosticating	> Testing, predicting, or anticipating market responses to potential, proposed, or actual marketing actions to validate the firm's current or decide future marketing manoeuvres.
Leadership A process whereby an individual influence a group of individuals to achieve a common goal.	Firm	Facilitating	> Positioning oneself collegially in the organisation's marketing process in order to assimilate and empower latent and expert human resources.
	Firm	Arbitrating	> Assuming a commanding, mentoring, or adjudicating role within the organisation for the sake of marketing progress.
Life experiences Composed of one's values, personal skills, training, and talents which help with ways of understanding how things and people are linked.	Marketing specialist	Finessing	> Applying non-marketing experiences to add artful subtleties or nuance to a marketing project.
	Firm	Fraternising	> Conducting oneself in a manner which encourages relations with the organisation's personnel and stakeholders.
	Market	Resonating	> Marketing specialists provoked a behavioural response from their audience due to their project's settings, having pitched to a germane or sentient human affectation or motive

Concerning marketing expertise, this knowledge domain was constituted with three practices across all three levels. At the marketing specialist level, conceptualising practices were utilised among the marketing specialists to propose relevant ideas and approaches when determining aspects of their marketing project's settings. When conceptualising, the marketing specialists' input was typically based and shared around their area of expertise such as research, branding, or creative concepts or design. Next, the consolidating practices of the marketing specialists at the firm level assisted in developing viable and relevant settings for each of the marketing projects. Here, the marketing specialists would use their expertise to incorporate stakeholder and personnel's perspectives and parameters into their projects' settings. Third, the practices of championing drew upon the marketing specialists' expertise to investigate the furthering of their project's aims and impact on the market. Essentially, marketing expertise was utilised by marketing specialists to optimise their projects' settings, their firms' human and material resources, and their markets' responses to their offering.

The next knowledge domain, organisation familiarity, was found across the cases and was composed of two practices, anchoring at the marketing specialists and ingraining at the firm level. The practices of anchoring depict how marketing managers upheld their understanding of their firms' branding, resources, and objectives against other marketing specialists' creative input or proposals. Knowledge regarding the firm's personnel, structure, culture, stakeholders, resources, capabilities, strategic intent, identity, offerings, and its commercial setting was critical in developing 'authenticity' to their projects' settings. Next, the ingraining practices of the marketing specialists depict their widening and deepening understanding of and engagements with, and accountability to their firm and its goals, their stakeholders, and industry. Here, the marketing specialists' ingraining practices provided greater proximity to organisational data, culture, and objectives which proved crucial to their projects' settings and 'confidence' with their firm's personnel. In brief, the marketing specialists' anchoring and ingraining practices increased their ability to determine and defend their project's settings.

The third knowledge domain, market intelligence, provided the marketing specialists insights into their market, including their target audiences' preferences and their competitors' activities. Market intelligence was composed of two marketing specialist practices, calibrating and prognosticating, which were found at the marketing specialists and market levels respectively. When calibrating at the market level, the marketing specialists would use the market's voice, research, and expert opinion to govern the marketing project's settings to reflect market preferences. Knowledge of the market's preferences helped the marketing specialists resolve settings of their projects, despite the contending views of senior stakeholders. Whereas when prognosticating at the market level, the marketing specialists sought to anticipate their marketplaces' response to various scenarios brought about by changes in their project's settings. By calibrating and prognosticating, the marketing specialists integrated project settings that

were determined by and relevant to their respective markets, thereby increasing their firms' confidence in their projects' returns. Overall, market intelligence appears to be relatively distinct to marketing specialists, although frontline staff and other personnel may have strategic insights into some regions of their market. Importantly, the marketing specialists were aware they required constant updates in their market intelligence due to the ever-evolving tastes and behaviours of their marketplace.

The fourth knowledge domain, leadership, was found across the cases at the firm level and was composed of two practices, facilitating and arbitrating. The facilitating practices of the marketing specialists garnered the perspectives of stakeholders with the aim of building consensus toward marketing project and its objectives, typically in a collaborative way. When facilitating, to garner the perspectives of stakeholders, for instance, the marketing specialists engaged in a humble and obliging attitude. In contrast, while the practices of arbitrating were not necessarily authoritarian, the marketing specialists were leading stakeholder decision-making using a variety of levers available to them. These levers include the voice of the market, expert opinions, and robust marketing practices and principles, which helped convince stakeholders to cede to the marketing specialists' recommendations. Therefore, in their leadership role, the marketing specialists influenced senior managers, board members, stakeholders, and personnel to help develop and comply with their projects' settings and aims.

The final knowledge domain, life experiences, was composed of three practices: finessing, fraternising, and championing, each respectively occupying the marketing specialist, firm, and market levels. First, finessing at the marketing specialist level meant marketing specialists injected, tuned, or 'honed' the marketing project settings with affective cues to generate emotive responses from typically cynical audiences. The practices of finessing were essential as missteps or miscues in injecting affective cues would likely have negative effects on subsequent branding and sales outcomes. When finessing, the marketing specialists would iteratively discuss various details of their projects' settings with each other, to check and double-check the possible emotive response of each setting. Next, the practices of fraternising at the firm level imbued relational qualities which assisted in connecting and smoothing interactions with personnel throughout the changes and disruptions their marketing projects introduced. In other words, the marketing specialists drew from their life experiences to ensure that their relations with non-marketing personnel and stakeholders were professional. Third, the practices of resonating at the market level meant that the marketing specialists would draw from their life experiences to 'pull on' their target audience's 'heartstrings'. By thinking about their responses to their projects' various emotive settings and concepts, the marketing specialists would estimate if their audience might be sufficiently motivated. Therefore, resonating at the market level was crucial in 'humanising' each project, short-circuiting cynical responses to advertising, and maximising

potential sales volumes. Finally, life experiences merged with other marketing specialist knowledge domains to bring holistic and humane attributes to each of their projects' settings.

Next, Section 5.2 discusses the informing influences, including the revelatory influences which helped the marketing specialists further develop and shape their project. Unlike the five knowledge domains discussed above, these categories were not determined a priori but emerged as indispensable findings regarding the practices of marketing specialist knowledge and their subsequent influence. Following on, Sections 5.3 and 5.4 discuss the practices of marketing specialist thinking and judgement-making which are antecedents of their influence at the marketing specialist, firm, and market levels.

5.2 Consulting practices

As shown in the above section, besides the knowledge carried by each marketing specialist, they also drew from the knowledge and expertise of others. Called consulting, these practices describe further how marketing specialists developed their marketing project and broadened their knowledge in the process. The practices of consulting draw relevant knowledge from non-marketing sources.

Although a discussion on informing sources as a cohort is optional, this research delineates the internal from the external sources to further understand each role and their significance. Internal sources include non-marketing specialists such as each firm's board members, senior managers, stakeholders, and personnel. As inferred, external sources include non-marketing agencies or subject-matter experts from the academic community or other industries. In describing the significance of informing sources, a marketing specialist provided the following journal entry:

“The best project outcomes are directly related to the diversity of opinion that comes via consultation, debate and discussion. This means allowing sufficient time and methods for ideas to be identified, developed and finessed, and the broader business or market factors to be taken into consideration. Just following a step-by-step analytical process, without broader consultative input, is less likely to result in a project achieving its full potential.” Peyton: marketing specialist. Journal entry (C2:P1).

Each marketing specialist indicated they had a strong sense from the beginning of how their marketing project should look and feel. However, as Peyton suggests, given sufficient time and the appropriate sources, the likelihood of accurately calibrating their marketing project's settings increased. Hence, acquiring broader views on the business inputs and market impacts of the marketing project also appeared to increase the marketing specialists' confidence in the project reaching its potential.

When considering the influence of informing sources, the marketing specialists' knowledge domains, practices, and subsequent thinking workspaces were broadened. For instance, when consultants share their subject-matter expertise with marketing specialists, the relevant

knowledge domains of the marketing specialists are further enriched. Indeed, the primary purpose of eliciting the views of subject-matter experts is to develop a more robust and comprehensive marketing project:

“[The marketing specialist’s role] was very much about **capturing everybody’s ideas and thoughts and then trying to coalesce that** into something that made sense.”
Corey: senior manager (C3:P4).

As Corey intimates, whether or not the marketing specialist had their project ideas, they are obliged to listen to the ideas of key stakeholders and consultants. One key reason is that marketing specialists may not have the expertise to develop every facet of the marketing project; therefore they were expected to recognise the cogent ideas of others. Identifying and linking relevant intelligence is necessary given the marketing specialists' central role in developing marketing projects. Therefore, capturing diverse perspectives added alternatives that assisted the marketing specialists to construct ‘something that made sense’.

However, as information flows both ways, bonds formed between the marketing specialist and their sources, added to the knowledge domains of both parties. For instance, the organisation familiarity of external consultants increased when marketing specialists provided them with feedback on their proposals. One of the merits of marketing specialists conversing with internal and external influences is the mutual informing of practices between parties. Furthermore, in almost every consultation, participants described open, engaging, and sometimes challenging forums between the informing sources and the marketing specialists. As Corey the senior manager says above, the marketing specialists had to capture and coalesce everyone’s ideas ‘into something that made sense’. In other words, the marketing specialists had an assortment of concepts and logistics to consider when developing a marketing project. Therefore, communication with relevant stakeholders was critical, before developing viable ideas.

5.2.1 Sources within the firm

Internal sources consist of subject-matter experts, senior management, and other personnel within the firm, whose perspectives and resources shaped the marketing project. Depending on the case, internal influences may include personnel from only senior levels, or involve personnel from each level throughout the firm. As mentioned, consulting between marketing specialists and informing sources served to inform the practices of both parties. The second aspect of consulting is where both parties aligned with the unified objective of a marketing project. For example, Logan the marketing consultant describes how a brainstorming session was run in order to develop a firm’s rebrand. The purpose of the workshop was to unify personnel around the marketing project’s goals and increase business performance:

“**I’m also wrangling opinion...** To get quite often **a disparate group of people**, many of whom are outside their knowledge or comfort zone when we’re talking about this sort of stuff [branding] because it’s quite airy-fairy. It’s quite, you know, marketing

gobble de gook. To make it plain and simple and **to help them agree on a unified vision** as to who they are, why it should matter to their market and how they can use that to build and grow their business.” Logan: marketing consultant (C3:P1).

Here, the marketing specialist assembles the perspectives and ideas of personnel within the firm. The purpose of this internal marketing exercise is to elicit brand insights, create unity, and generate consensus toward the marketing project before its launch. Incidentally, the wrangling of information and perspectives discussed above drew upon on the organisation familiarity and market intelligence of participants. Here, consulting unified objectives and facilitates market orientation as well. Moreover, by engaging with a marketing specialist, non-marketing personnel develop some marketing expertise which is likely to increase their contribution to business performance positively.

Moreover, the consulting of internal sources increased the operational fluidity required to integrate and launch each marketing project successfully. The phrase operational fluidity describes a design and feedback process where marketing specialists and their informing sources aimed to develop and execute marketing projects as smoothly as possible. Concerning operational fluidity, the following excerpt describes the variety of internal sources involved in a marketing project and why they were involved:

“It was marketing [specialists] sitting down with [frontline staff], with the technical experts, with the CEO, with the board, with the supply chain management, **all the different aspects of the business**, with our [overseas] teams as well, **helping them understand the information and then forming a conclusion, testing it out, sense-checking it** with different people, having a lot of discussions.” Peyton: marketing specialist (C2:P1).

Peyton describes the magnitude of communicative support required before launching their marketing project. As marketing specialists discussed their marketing projects, they were essentially preparing stakeholders and personnel for change. However, these changes had firm-wide knock-on effects that marketing specialists also needed to understand. Despite their organisation familiarity, it appeared that some logistical, personnel and budgetary implications which each change imposed throughout the firm lay outside the purview of marketing specialists. Therefore, the marketing specialists engaged in firm-wide dialogue with relevant stakeholders and personnel to achieve operational fluidity.

In brief, apart from helping the marketing project integrate smoothly, marketing specialists engage with personnel including subject-matter experts, researchers, and cultural ambassadors for their input. This process of consulting informs the practices of the marketing specialist, creates a unified objective, and assists in operational fluidity. Hence, marketing specialists aimed to reduce uncertainty and mitigate risk by using the perspectives and expertise employed within the firm.

5.2.2 Sources external to the firm

As well as drawing from sources from within their firm, the marketing specialists sought help and expertise for their projects from external sources. External sources describe consultants whose independent standing and subject expertise supported each marketing project. From the cases investigated, external influences included a Crown Research Institute organisation, a university professor, lawyers, and business generalists and consultants. Their areas of expertise included in strategic planning, industry expertise, creative design, business statistics, and film production. These external influences also served to inform practices, unify objectives, and assist in operational fluidity. The following excerpt from Peyton, a marketing specialist, describes how the practices of an external influence informed their marketing project:

“Inviting those **external experts was not something that we’d done before** and to me that was part of **ensuring we were doing the right thing**, ensuring we were answering the right questions, **adding robustness to the process** so we could talk to [our production line] and... so **we can convince ourselves that we weren’t just applying our small minds to this decision-making process**, we were seeking external expert opinion as well, and that **gave us an added level of confidence in what we were doing**.” Peyton: marketing specialist (C2:P1).

Peyton recognised that the perspective of external experts helped their firm move forward confidently for three reasons. First, Peyton acknowledges that being immersed within a firm or industry may limit both one's innovative thinking and problem-solving ability. Second, the marketing project process becomes more robust due to the independent research and views of outsiders. Third, the marketing specialist suggests that external experts help the firm ‘ask the right questions’. External sources may have experience in a variety of approaches or maladies that may be readily transferable to each marketing project's context. In contrast, consulting only internal sources was recognised as inherently limiting. As the following example from a marketing consultant shows, bringing in an external expert aids in both unifying objectives and operational fluidity when conducting a marketing project:

“**People often try and do these projects internally and they typically wither on the vine**. And I’ve been bought into projects over the years, where they go ‘we spent last year trying to do this’. **You need an external party**. You need someone that will come it because **it makes people behave differently**. It puts people in a different mindset.” Logan: marketing consultant (C3:P1).

External agencies provided both specialised expertise and were neither relationally or politically aligned within the firm; hence they were likely to be perceived as objective agents of change. The marketing consultant recommended that specific marketing projects require external agency input if they are to succeed. This assertion contrasts with a previous view (see Section 5.1.2), which argued that agencies often lack the relational mechanisms which entrench a marketing project within the fabric of the firm. However, the marketing consultant counters this argument suggesting that tense relations among the firm's personnel can limit progress. Moreover, an

external agency is more likely suited to introducing and implementing certain aspects of a marketing project. Specifically, the marketing consultant suggests that by using an external agency, internal relational dysfunction and political manoeuvring within the firm can be neutralised.

Due to the rapport and history between marketing managers and some consultants or agencies, the organisation familiarity of some external influences appeared to be quite high. Furthermore, some consultants considered themselves as having a special relationship with the firm they were contracted to:

“We really **work in synergy** with the [firm’s] team... **[Our agency is] really almost an extended part of their team sometimes**. So it's a very good relationship. They come to us for a lot of research, insights and needs they have. Or sometimes even to discuss ideas.” Drew: marketing consultant (C2:P4).

Here, an external agency describes their relationship with the marketing managers of a firm as symbiotic, where their projects and engagements take precedence. Strong bonds between external influences and marketing managers, due to the informing of practices, would suggest that the external consultant would have organisation familiarity. In these cases, the external consultant's knowledge of the firm, its industry, personnel, goals, branding, and culture is likely to enhance the consultant's value to the firm. Conversely, this relationship is also likely to enhance the external consultant's allegiance to the firm as well.

As with the practices of each of the marketing specialists’ knowledge domains, consulting practices is constituted with procedures, understandings, and engagements. Regarding procedures, marketing specialists knew that the iterative nature of consulting sources was a critical and robust means of determining their projects' settings and broadening their marketing expertise. Concerning understandings, marketing specialists knew how various perspectives regarding each of their projects’ settings would guide their decision-making into making more informed, robust judgements. Regarding engagements, despite the time, effort, and expense, the marketing specialists believed that consulting sources was a worthwhile investment toward deciding upon their marketing projects’ settings. The procedures, understandings, and engagements of the practices of consulting sources are summarised below in Table 5.2.

Table 5.2: Consulting sources by constituent practices.

Practices are constituted by:		
Procedures	Understandings	Engagements
Def. Explicit rules, principles, precepts, and instructions, what is sometimes called discursive ‘know-that’ knowledge.	Def. Knowledge of what to say and do; skills and projects, sometimes called ‘know-how’ (i.e., tacit cultural templates for understanding and action).	Def. Linking ends, means, and moods that govern what makes sense to do beyond the procedures and understandings.

Consulting sources	The marketing specialists knew that the iterative nature of consulting internal and external sources was a critical and robust means of determining their projects' settings and in broadening their marketing expertise.	The marketing specialists knew how having various perspectives on each of their projects' settings would guide their decision-making into making more informed, robust judgements.	Despite the time, effort, and expense, the marketing specialists believed consulting sources was a worthwhile investment toward deciding upon their marketing projects' settings.
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Overall, the two-way interaction or consulting between marketing specialists and their sources were vital for each firm in order to produce marketing projects robustly. In brief, the consulting of internal and external sources with marketing specialists supported the informing of practices, the unifying of objectives, and operational fluidity throughout each project. Following on, although not specifically a marketing specialist practice, discussed next is another external influence identified by the participants' responses whose nature is distinguished from those of informing sources.

5.2.3 Revelatory influence

Part of the marketing specialists' role, having accumulated the market research, expert opinions, and applied the appropriate marketing principles and tools, was to produce the 'big idea' or project concept. Despite having immersed themselves within the marketing project's details and objectives, amassing data, expert opinions, resources, and ideas, often the marketing specialist still lacked their project's specific creative expression. Not having a specific concept meant that a marketing project would lack resonance with the firm and its target market; hence the project was unlikely to be approved. However, in each of the cases, and reportedly in times past, marketing specialists described how, in a flash, an idea to express their project came to them. When these occurred, rather than having a general idea of the way the marketing project could manifest, the marketing specialist often knew precisely what to do. As intimated, rather than the revelatory influence being one of their practices, the marketing specialists were typically the recipient of this phenomenon.

Participants described occurrences of revelatory influences during the development of their current or past marketing projects. Here, in addition to drawing from their suite of knowledge domains and informants, some marketing specialists attributed the shaping of their projects to a metaphysical influence. Due to the following phrases emerging during their interviews, marketing specialists were asked to describe their 'light bulb' or 'bolt from the blue' experiences in their journals. The following long excerpt from one journal is provided to not only describe a marketing specialist's light bulb moments but their response and reflection upon the 'light bulb' idea's merit:

“I definitely can recall several moments **of clarity or certainty** when **you realise that an idea, a way forward, a concept is 'just right'**. For me these moments happen in most projects and they happen mostly **when I am away from work and probably not**

even consciously thinking about the project... I attribute these moments mostly to have some quiet time and space with constant interruptions to consciously or subconsciously reflect and to listen to that intuitive voice or gut feeling that is so important for instinctive marketers. I'm not sure all marketers have it – I think some may run blind without it, or others don't trust it and need research etc to decide the next step. For me, **my response is to generally trust the moment of clarity – but also still think critically to see that it is a genuine light bulb moment**, rather than just wishful thinking!" Carter: marketing specialist. Journal entry (C1:P3).

This 'light bulb' kind of influence is distinct from the marketing specialists' practices described above, and their cognitive abilities, discussed further in Section 5.4.1 For instance, as the marketing specialists draw upon their knowledge domains, they are recollecting. These recollections may reform in new ways in order to answer a new problem. However, there is little evidence in the excerpt above that suggests the 'light bulb' moment was caused by critical, rational, or creative thinking techniques. Rather, as seen in the above excerpt and others provided below, Carter indicates that the 'genuine lightbulb moment' came during the absence of reasoning, recollecting, or deliberating on his project.

In order to name this kind of influence or idea, the term revelatory was chosen due to participants' use of words such as 'clarity', 'certainty', and 'moment of truth'. As mentioned, revelatory influences or ideas appear to be distinct from the marketing specialists' thinking processes in several ways. First, these instances are described as occurring during the absence of purposeful strategising or reasoning. Second, rather than indicate a general idea, they are often described as providing clarity and certainty. Third, although the evidence suggests an external influence, the source was unclear. However, similar to the perspectives given by internal and external sources, revelatory ideas are also subject to critical thinking processes in order to test their viability.

This section on revelatory ideas serves only to introduce this topic. Section 5.4.2.2 below analyses further the participants' descriptions of revelatory ideas. This discussion includes the timing, triggering, truth and certainty, transcendent nature, and testing of this kind of influence. Before further analysis of revelatory influences, the following section discusses the practices of marketing specialist thinking and marketing specialist judgement in order to provide further context.

5.3 Marketing specialist thinking practices

Across the case studies, a clear link between the knowledge described above, and the marketing specialists' influence is their thinking and judgement-making practices. Although certain actions of the marketing specialists beget influence, their thinking and judgement-making practices appear to play a seminal role in their influencing. Marketing specialist thinking is described as 'the process of considering or reasoning about...' all aspects of their marketing project (Oxford dictionary, 2018). The following excerpt from Piper the marketing specialist provides aspects of

the marketing specialist thinking process which have been discussed, i.e., knowledge domains, informing, and revelatory influences. However, aspects of marketing specialists' thinking and judgement-making practices are also introduced here. Elicited during a one-on-one interview, the marketing specialist replied at length to a question about how they come up with the right idea or concept for their projects:

“You use your brain. Thinking about it... You just take the information, you digest it, you're just thinking about it and it all starts to crystalize... what the one key message is that achieves all of those objectives? ...So say we are working on a new campaign idea... I'll know what product it is or what we are trying to communicate, I'll have an idea, I'll already have my own thoughts about how we should be communicating this and what the idea is, but then I'll discuss it, particularly with the creatives... And then we will discuss it and discuss it, and ideas will go backwards and forwards between us and he might go off and think about it for a bit, come back to me and say 'Yeah I've been thinking about it but what about if we twisted it slightly around to this angle' and that's the iterative of process bouncing ideas backwards and forwards... I think usually, occasionally it can be a blinding flash of light, but usually it comes through that discussion... it's the cumulative experience of whatever that leads to it.”
Piper: marketing specialist (C3:P3).

Piper describes the various constituents and workings of her thinking processes when developing a marketing project. To describe how she came up with ideas, Piper first discusses the context or the situation the marketing project is responding to. For instance, Piper identifies a 'new campaign' and the 'what the one key message is that achieves all of those objectives'. Next, the knowledge domains the marketing specialist draws from are alluded to. Here, Piper says 'You use your brain. Thinking about it', as well as, 'I'll already have my own thoughts about how we should be communicating this and what the idea is'. These statements imply that Piper has reflected on the situation at hand, including the objectives the firm is aiming for, and drawn from her suite of knowledge domains to form a judgement; 'You just take the information, you digest it, you're just thinking about it and it all starts to crystallize'. These passages reiterate the nature of marketing specialists' practices, that is, the knowledge that guides the marketing specialist's activity.

To assist in developing the marketing project, Piper sought guidance, identifying several sources. As discussed, sources are subject-matter experts, whether internal or external to the firm, whose input is relevant and attuned to the marketing project's development. In the above case, sources were identified by Piper as 'creative agencies', 'my boss', 'peers', and 'our company'. The relationship between marketing specialists and their sources is iterative and focused through 'conversations', 'discussions and feeding off each other'. Informing sources also play major roles in the budgetary, political, and logistical aspects of a marketing project, whose input was considered in Piper's thinking processes.

Although Piper described herself as having already formed a judgement, the subsequent iterative discussions she engaged in deserve examining for several reasons. First, Piper held

talks to determine whether or not her idea would withstand scrutiny, a necessary procedure when pursuing robust ideas. Second, assuming they are accepted, Piper's ideas are likely to provide some original content for the project which stakeholders might use to develop further or to spark creativity. Third, these discussions provided Piper with a schooling opportunity as she probed the viewpoints of experts, further enriching her knowledge domains. Finally, Piper also introduces the notion that the ideation process may also provoke 'a blinding flash of light', introduced above as revelatory influences in Section 5.2.3. Furthermore, Piper suggests the project's processes were aided by the accumulation of iterative discussions with stakeholders, implying that time to think, discuss, and wait for solutions were critical.

The significance and process of thinking practices are a significant consideration when examining marketing specialist knowledge and its influence. The thinking practices serve to resolve by engaging the knowledge domains discussed above, as well as inputs from internal, external, and revelatory influences. As an excerpt from the following journal shows, the marketing specialist reflected on a variety of facts, objectives, procedures, and influences to develop their marketing project:

“In terms of understanding and managing stakeholder needs, developing the brand architecture and creative executions etc., that **definitely requires human thought, creativity, perspective and intuition/ gut feel and not just from one human, a collaborative approach** of different skills e.g., strategy, creative, copywriting, visual art skills etc.” Carter: marketing specialist. Journal entry (C1:P3).

Carter journaled that third parties enhance the marketing project's development; however, it is the marketing specialist's thinking process that takes a central role. For instance, the above excerpt describes how marketing specialist thinking draws from organisation familiarity, i.e., 'understanding and managing stakeholder needs'. Also, their marketing expertise, i.e., 'brand architecture and creative executions', life experiences, i.e., 'perspective and intuition/ gut feel', and the expertise of others, i.e., 'strategy, creative, copywriting, visual art skills'. The following excerpt extends the marketing specialist's set of considerations in this role:

“A successful marketing campaign also **involves creativity, inspiration and emotion which is something that analysis of data alone cannot give you.**” Piper: marketing specialist. Journal entry (C3:P3).

The two journal entries above, when combined, describe the thinking practices of marketing specialists as being composed of theorising, understanding and managing subject matter, developing, and creating. These active, cognitive processes coalesce the marketing specialists' knowledge with external influences which culminate toward sound decision-making. Moreover, human thought, emotional intelligence, creativity, perspective, intuition, and gut feel appear to provide a more holistic picture of marketing specialist thinking than just performing logical inferences. In sum, all these considerations combine and contribute toward the marketing specialist's thinking and judgement-making.

As with the other practices discussed, marketing specialist thinking is comprised of procedures, understandings, and engagements. Regarding procedures, the marketing specialists used two sub-procedures in their thinking practices, namely meditating and contemplating. Meditating mingled aggregated knowledge toward forming a solution, whether an idea, concept, or answer. Next, the marketing specialists' contemplating would carefully consider or test the solutions posited while meditating. Concerning understandings, the key characteristic was the marketing specialists' conceptualising ability. Here, they overlaid the whole or attributes of their projects' settings over the whole or aspects of their firm or market to determine whether an idea was likely to work.

Regarding engagements, the marketing specialists' were equipped to determine solutions and anticipate feedback as different settings were conceived. In this way, the marketing specialists would determine both the effectiveness and appropriateness of ideas and are further evidence of the necessity of their central role in managing projects. The procedures, understandings, and engagements of the practices of marketing specialist thinking are summarised below in Table 5.3.

Table 5.3: Marketing specialist thinking by constituent practices.

		Practices are constituted by:		
		Procedures	Understandings	Engagements
		Def. Explicit rules, principles, precepts, and instructions, what is sometimes called discursive ‘know-that’ knowledge.	Def. Knowledge of what to say and do; skills and projects, sometimes called ‘know-how’ (i.e., tacit cultural templates for understanding and action).	Def. Linking ends, means, and moods that govern what makes sense to do beyond the procedures and understandings.
Marketing specialist thinking		The marketing specialists used two sub-procedures in their thinking practices, namely meditating and contemplating. Meditating mingled aggregated knowledge toward forming a solution, whether an idea, concept, or answer. Next, the marketing specialists’ contemplating would carefully consider or test the solutions posited whilst meditating.	The key characteristic was the marketing specialists’ conceptualising ability. They overlaid the whole or attributes of their projects’ settings over the whole or aspects of their firm or market to determine whether an idea was likely to work.	The marketing specialists were equipped to determine solutions and anticipate feedback as different settings were conceived, thus determining both the effectiveness and appropriateness of ideas.

5.4 Marketing specialist judgment-making practices

As discussed, the purpose of marketing specialists' thinking about each aspect of the marketing projects is to produce sound judgements. The term marketing specialist judgement-making is used here as a catch-all for the language used by participants such as ‘marketing solutions’, ‘conclusions’, ‘recommendations’, ‘ideas’, ‘rationale’, ‘gut-feel’, or ‘decisions’. Therefore, marketing specialist judgment-making is described as ‘the ability to make considered decisions or come to sensible conclusions’ in the context of a marketing specialists’ role (Oxford dictionary, 2015b). The following excerpt from a senior manager provided a precedent for the name and the attributes of this theme:

“I think relationships between data and action aren’t linear, they never are. **They are a within a band of linearity. Judgement is about the interpretation of which of the family of curves is the actual one that is the answer, and the one thing you know is you are never right, but you are as right as you can be.** So I think it’s a **combination of data and interpretation of that data and using judgement and intuition and experience to decide** which is the right path.” Corey: senior manager (C3:P4).

Corey, the senior manager, describes judgement as an ‘interpretation’, with the caveat that judgements are ‘never right, but you are right as you can be’. This description of judgements contrasts with the attributes of revelatory influences, which are described by Carter the marketing specialist as ‘providing certainty’. However, judgements are not considered nor expected by Corey to be expressed in terms of certainty, rather judgements provide ‘the right path’, ‘within a band of linearity’. The senior manager identifies that the practices which

constitute the judgement processes, i.e., knowledge retained from mentoring, research, monitoring, and experiences, comprise both prescriptive and instinctive properties. Another case provides a further example of what constitutes the marketing specialist's judgement:

“There’s only so much the research can tell you and then you need to apply some good judgement to that... **it comes back to you bringing your personal value set, all of that comes into your gut feel, that judgement.**” Peyton: marketing specialist (C2:P1).

Peyton describes using her knowledge domains to compensate one for another in order to make a judgement. For instance, while market intelligence, i.e., ‘research’, provides some direction, life experiences, i.e., ‘your personal value set’, is also employed to offset a lack of market data. Peyton stated that their market intelligence was limited in providing certainty in its evaluations of the market. Therefore, the marketing specialist is obliged to incorporate their instincts, leaning on insights they may have as a marketing specialist as well as a market constituent.

While analysing data relating to how marketing specialists think, it was noted that marketing specialists arrived at judgments in two distinct ways. The first way they formed judgements was by drawing from their knowledge domains. This method was based on their experience, intuition, and insightfulness, which combined are called cognitive judgements here. The second way was co-creative judgement-making, where consulting and revelatory influences combined with the constituents of the marketing specialist’s knowledge domains to arrive at a judgement. The following sections discuss cognitive and co-creative judgement-making with examples.

5.4.1 Cognitive judgement-making

Exhibited in several excerpts already, marketing specialists made decisions throughout their marketing projects unaccompanied, i.e., without the direct input or influence of others. These instances are described here as cognitive judgements. The evidence suggests that cognitive judgements occur as a result of marketing specialists drawing exclusively from their knowledge domains. In other words, this type of judgement-making appears to be formed by various ways of recollecting. The data gathered from participants suggest that cognitive judgements developed from experience, gut instinct, and insightfulness.

5.4.1.1 The experience, intuition, and insightfulness of judgement-making

As discussed, experience is one of the main characteristics of a marketing specialist. Experience has been defined as ‘the knowledge or skill acquired by a period of practical experience of something, especially that gained in a particular profession’ (Dictionary, 2015). As the marketing consultant points out in the following excerpt, it is by experience that they have been able to make the correct marketing decisions:

“I’ll tell you [how I knew what to do], 25 years’ experience... I’m not saying I’m not fallible, we all make mistakes, but **when you are doing something, it’s your craft and you’re doing it all the time, you just get a feel and you just...** because you build up

layer upon layer, **you just build this institutional knowledge and understanding and context and you just have an instinct** and a sense of ... because we live and breathe this thing, ...and we have really strong sense of who they are and where we're going in the market and the barriers and the issues... **So it was just ticking away in your brain.**" Logan: marketing consultant (C3:P1).

As opposed to a dormant repository of knowledge, Logan's marketing experience was cumulative, bounded, and connected with his 'institutional knowledge and understanding and knowledge' and 'ticking away' in his brain. In these terms, experience provides a sense of one's environment and capabilities, with which one can instinctively and confidently ascertain a solution. According to the journal entry of one marketing specialist, experience is critical when conducting a marketing project:

"An IT Manager or a Finance Manager or an HR Manager, **they would not have the knowledge and experience to carry out a marketing project.** They **wouldn't know the questions to ask**, don't have the industry knowledge or have the technical competencies to implement a marketing project." Piper: marketing specialist. Journal entry (C3:P3).

Also mentioned in the above excerpts are intuition, feel, sense, and gut instinct, which are considered synonyms here. Intuition is defined as the ability to understand something instinctively, without the need for conscious reasoning (Oxford Dictionary, 2015a). As discussed, intuition or instinct provide the insights marketing specialists may acquire due to both their profession and being a consumer themselves; insights they may apply to the marketing project. While experience and intuition have been discussed, insightfulness also emerged concerning the marketing specialists' cognitive judgements. Insightfulness is described here as the linking of distantly associated ideas, where a solution might be developed by the unexpected connections of diverse concepts (Schilling, 2005):

"It's a little bit lot having lots of things go around in your head, **but someone put them into a successional, logical plan.**" Kelsey: senior manager (C1:P4).

Described as insightfulness here, Kelsey the senior manager recognised his marketing specialist could link the resources, circumstances, and objectives of a marketing project into a logical plan. As discussed, the connection between experience, intuition, and insightfulness is recollection; these attributes rely on the marketing specialists' aggregated knowledge domains. The following excerpts describe how these three premises make up the cognitive judgements of marketing specialists:

"**We don't have the depth of insight yet that we would like to have** to be able to deliver really smart insight-lead proposition development... Our maturity in terms of insight aggregation and then turning that into propositions, **there's a lot of gut-feel or a lot of, I guess, experience rather than empirical data** that is driving a lot of the stuff we've done." Tristan: senior manager (C3:P2).

In the above instance, a senior manager bemoans a lack of market intelligence resources and that projects have been driven using only 'experience' and intuition i.e., 'gut-feel'. However, with more empirical market data, they would have a greater 'depth of insight', and more maturity in their 'insights aggregation'. Hence, experience draws on existing knowledge domains along with intuition which draws on unconscious or instinctive resources. Whereas insightfulness links distantly associated ideas, where a solution might be developed by the unexpected connections of diverse concepts (Schilling, 2005). The reverse situation is described above, where intuition and judgement supplemented market intelligence. In this case, market intelligence is sparse and its absence is described as a 'lack of insight' or lack of 'maturity in terms of insight aggregation'. Therefore, the cognitive judgements of marketing specialists are comprised of experience, intuition, and insightfulness. Here, experience is institutional knowledge, intuition is an unconscious resource, and insightfulness is constituted by linking diverse ideas and concepts. In formulating a judgement, the resources of each cognitive archetype complement the shortcomings of the others. The following excerpt is indicative of these marketing specialist attributes working together in marketing projects:

“You need to have your head in the game and you need to then ask the right questions or have the right research information to support any rationale for change... you need to know where [stakeholders] heads are at and you need to bring all of those different variables together to try and have something that is a sound recommendation which is got limited ability to be challenged because **you've done all your homework and pulled all the information together with the right rigour.**” Taylor: marketing specialist (C2:P2).

Cognitive judgement is perhaps best summed up by the marketing specialist above as 'getting your head inside the game.' Here Taylor lists many variables the marketing specialist must anticipate, formulate, and address when making decisions regarding the marketing project. In other words, Taylor is inferring that having 'your head in the game' is where experience, intuition, and insightfulness are all, without exception, crucial in order to provide the 'right rigour' to a marketing project.

Similar to the practices discussed above, marketing specialist cognitive judgement-making is comprised of procedures, understandings, and engagements. Regarding procedures, the marketing specialists gathered and deliberated on all the information, insights, and confidence they needed to make informed and defensible decisions regarding their marketing projects' settings. Concerning understandings, the marketing specialists knew how to assess whether or not the decision in question needed further collaborative input or not. Regarding engagements, the marketing specialists made cognitive judgements believing their mentoring, experience, and intuition along with their understanding of their projects' context provided a suitable means for a decision. The procedures, understandings, and engagements of the practices of cognitive judgement-making are summarised below in Table 5.4.1 While cognitive judgements consider

how marketing specialists come up with solutions by themselves, the following section looks specifically at how marketing specialist judgements were co-created in the cases studied.

Table 5.4.1: Cognitive judgement-making by constituent practices.

		Practices are constituted by:		
		Procedures	Understandings	Engagements
		Def. Explicit rules, principles, precepts, and instructions, what is sometimes called discursive ‘know-that’ knowledge.	Def. Knowledge of what to say and do; skills and projects, sometimes called ‘know-how’ (i.e., tacit cultural templates for understanding and action).	Def. Linking ends, means, and moods that govern what makes sense to do beyond the procedures and understandings.
Marketing specialist Judgement-making		The marketing specialists gathered and deliberated on all the information, insights, and confidence they needed to make informed and defensible decisions regarding their marketing projects’ settings.	The marketing specialists knew how to assess whether or not the decision in question needed further collaborative input or not.	The marketing specialists made cognitive judgements believing their mentoring, experience, and intuition along with their understanding of their projects’ context provided the most suitable means for a decision.

5.4.2 Co-creative judgement-making

The marketing specialists arrived at co-creative judgements when assisted by consulting and revelatory influences. Here, co-creative judgements are the product of marketing specialists in situations where they seek technical or institutional expertise, perspectives, ideas, or stakeholder consensus. In these situations, marketing specialists are guided and assisted by others. The following excerpt, which discusses a marketing consultant's practice within workshops for a branding project, touches on these areas:

“I do put great value on the sort of the alchemy that happens in a room of people who have been working on this and thinking about this and belting ideas around and brainstorming, and then you come up with some sparks of definition which as I said before, I will take away and write up. Now sometimes what you've come up with in that session, amongst it there were some real diamonds, and you actually have what you need once you go through it. As long as you walk out of the room knowing that. Sometimes you know we've got our brand essence or promise and our value is nailed. Sometimes I [and my creative marketing partner] go away and we have to belt it around. But the fact is we've got all this raw information that we're putting in the top of the blender, and we ultimately come up with something that works.” Logan: marketing consultant (C3:P1).

Co-creation is discussed above as occurring in two settings. First, the marketing consultant is at a marketing workshop eliciting brand perspectives from personnel within a firm, ‘belting around ideas and brainstorming’. This co-creative workshop serves to inform Logan the marketing consultant of the staff’s perspectives regarding their firm’s offerings. Using their views, Logan will derive forms of brand architecture and the participants, it is hoped, will advocate for the resulting project settings. If elements of the brand architecture fail to emerge from the workshop, a second co-creative partnership will take place. Here Logan and his

creative marketing partner will take the ‘raw information’ from the workshop and work together to arrive at the brand architecture. In both settings, Logan the marketing consultant was informed by the perspectives and expertise of others. Also, terms used in the above excerpt, such as ‘alchemy’ and ‘sparks’, hint at a collective insightfulness which might arise during the co-creative processes. The following sections look further at both the consulting and revelatory dimensions of co-creative judgements.

5.4.2.1 Consulting dimension of co-creative judgement-making

The consulting dimension of co-creative judgements is so-named because of the various views the marketing specialist listens to in order to develop their marketing projects. As described in Section 5.2 above, sources are made up of people either internal or external to the firm. Also discussed, the input of these people increases both the robustness of the marketing project process as well as stakeholder advocacy for the project. However, the following excerpt demonstrates how sources are sought to both ‘round out’ and further inform or challenge the ideas the marketing specialist came up with themselves:

“This is where it really **helps to have those wild card thinkers**... or someone from another department or somebody from outside the business in the room **to challenge that instinctive judgement, ‘Why are you making that call?’**” Peyton: marketing specialist (C2:P1).

In the above example, some sources are not immediately providing expert advice, but are first calling the marketing specialist to account for their own ‘instinctive judgement’. One might suppose after being asked, ‘why are you making that call?’, the marketing specialist justifying ‘that call’. One may further suppose that the ‘wild card thinkers’ would then bring in their expertise to guide the marketing specialist further, helping to co-create a broader-considered solution. However, the following excerpt is from an internal influence who describes their part in a co-creative process in rather combative terms:

“To me it always starts out with [going] into a room and then they go ‘[here is our marketing proposition]’. **And then you start throwing curve balls at them**, ‘What if this occurs, what if this occurs...?’ We just think of all the different scenarios that a customer would approach them with... It’s not just throwing curve balls its resource negotiation, as in who is going to do what?” Carson: ICT administrator (C3:P9).

While gathering stakeholder's broader perspectives, marketing specialists co-create the marketing project not only in innovative forms but also in functional and logistical detail as well. The administrator raises ‘what if...?’ and ‘who is...?’ questions, being part of a co-creative process where contingencies or resourcing scenarios are sought and considered in co-created judgements. In these ways, sources help marketing specialists shape, define, and solve problems.

5.4.2.2 Revelatory dimension of co-creative judgement-making

While sources helped co-create marketing judgements, participants also described how a metaphysical influence, distinct from gut-feelings and intuition, shaped the marketing project. As discussed in Section 5.2.3, these ‘light bulb’, ‘blinding flashes of light’, and ‘aha’ moments are described as revelatory influences or ideas. The following lengthy narrative from Lane, a marketing consultant, discusses several instances of revelatory influences he had experienced:

“What I’ve had to learn is to not worry about it because there is always a solution, there’s usually, hopefully a good solution – a creative solution to a problem and you just have to wait. **You have to get all the information you can and you have to think about it** and generally a solution will occur. But that’s through logic and thinking about it.

Often, that’s the awful cliché, **that it happens in the shower, or whatever. It tends to be for me in the middle of the night**...when you’re half asleep or whatever and you go ‘oh!’, and I think you’re brain maybe isn’t working as hard and so maybe you’re thinking more laterally, more clearly, I don’t know, and you go ‘oh what if that’s ... oh yeah, actually that would work’. **But I do think that the more you work on trying to solve a problem the better, but the actual solution very rarely comes when you’re trying to do that solving.**

It usually comes at a completely separate time... But I think it doesn’t happen unless you’ve been doing a lot of thinking about it anyway. **So I don’t think it’s like a free ride.**

On some occasions it has happened to me, where **you get the brief and you instantly see the solution**, and it goes all the way through till the end. That’s nice... and that’s probably happened a couple of times to me and it does seem like magic and you go ‘oh my God’, that’s very rare. **You can’t build a career on that.**

Yeah, **generally my reaction is it’s too good to be true. Hang on, I’ll go ‘what’s going to stop this from working’ and I immediately take a negative response to it.** I go ‘oh that’s really good, what’s going to trip me up? What’s going ... what’s wrong with it?’ Your brain works very quickly in that situation going no, this .. **you’re assessing things very, very quickly.**

It’s very emotional process. Yeah, totally and you ... and if you get to the point and go... ‘No, it actually won’t work because, whatever.’

But generally **in ninety-nine times there’s a seed of something else and that leads to something else, so I don’t think any idea is a waste, I think they evolve**... Yeah, and **some are collaborative**, where I might come up with an idea which I think is great and I’ll mention it to someone else and they’ll go, ‘what if you do this?’, and you go ‘oh of course’. I’m always surprised how **small comments people make can instantly improve an idea.**” Lane: marketing consultant (C3:P5).

Lane’s description provides some insights into how knowledge, thinking, consulting, revelatory ideas, and judgement-making are linked when working on his marketing project. Having researched and amassed intelligence related to the project, Lane appears to employ Type-2 thinking (Evans, 2003) to seek a solution, “through logic and thinking about it”. However, Lane suggests that a solution “rarely comes when you’re trying to do that solving”. Another

participant suggested that connecting data to the right action through logic alone provides only a broad answer, “within a band of linearity” (C3:P4). Later, while Lane is not thinking about the solution, while showering for example, a revelatory idea appears, which either prescribes or directs him toward “the solution”. Here, Lane suggests the idea may provide either a comprehensive resolution, or modest indicators and notions which might lead toward an actionable concept. Upon receiving a revelatory idea, Type-1 thinking, or “fast thinking” (Evans, 2011) appears to engage Lane’s stored knowledge, and he is “assessing things very, very quickly” to validate the idea. After assessing or developing the idea himself, the practices of consulting were then engaged when he discusses the idea with others, “They’ll go, ‘what if you do this?’” In other words, the practices of both thinking and consulting are used to test the revelatory idea toward judgement-making, thus linking these suppositions.

Furthermore, characteristics of the revelatory ideas marketing specialists had, ideas which were influential to their project, shared some common themes. These themes include the timing, triggering, truth and certainty, transcendent nature, and testing of these revelatory influences or ideas. The above monologue from Lane the marketing consultant served to introduce these topics and their occurrence in the following complementary excerpts. As mentioned, these attributes were shared among and reported by the marketing specialists and marketing consultants across the four cases.

As discussed in previous sections, cognitive and informed co-creative judgements are often developed in a purposeful and timely manner, whether in workshops, meetings or in scheduled privacy. Revelatory influences, on the other hand, typically occurred when the marketing specialists were not purposefully thinking about the project but were carrying out non-related activities often outside of the workplace. As Lane says, ‘the actual solution very rarely comes when you're trying to do that solving. It usually comes at a completely separate time.’ The following two excerpts by Piper and Carter, who are both marketing specialists, discuss the frequency of revelatory influences in different ways:

“Occasionally it can be a **blinding flash of light.**” Piper: marketing specialist (C3:P3).

“For me, **these moments** happen in most projects.” Carter: marketing specialist. Journal entry (C1:P3).

Concerning timing, note that revelatory influences can happen ‘occasionally’ or ‘in most projects’, depending on the marketing specialist. Lane suggests in the first excerpt that the more one tries to work on a solution, the more a light bulb moment is likely to occur. Other marketing specialists concur with Lane, suggesting the necessity to ‘grapple’ with an issue, or that after one’s brain has been ‘percolating’ it is more likely that a revelatory idea will appear. However, Lane also acknowledged that at times, ‘you get the brief and you instantly see the solution, and it goes all the way through till the end’; he was straightaway inspired, and the entire solution

was immediately apparent. Another consistent timing attribute of revelatory influences is the suddenness of their appearances.

Therefore, the timing of revelatory influences can happen occasionally or for most projects, they may occur after much thought has been undertaken, or instantly on viewing the brief. In other words, apart from manifesting suddenly, the timing and frequency of revelatory influences are inconsistent across the marketing specialists across the cases. The most consistent attributes of the timing of revelatory influences are that they occurred when individuals were not thinking purposefully about the project, but rather during a time of relaxation and often away from work.

As Peyton identifies in the following excerpt, a revelatory idea struck after there was 'so much percolating in your brain'. Peyton adds another characteristic of how a revelatory idea is triggered, i.e., 'by a smell, a sound, or a word':

“The only way that I can think to articulate it is that **there is so much percolating in your brain** at any one time. But some things are more to the front than others and I think there are times when it bubbles up. **Sometimes it can be triggered by a smell, a sound, or a word, and ‘boom’.**” Peyton: marketing specialist (C2:P1).

As Lane also said in his introductory excerpt, merely seeing a brief for the first time triggered the revelatory idea needed for that project. Although Lane concedes that usually a revelatory idea 'doesn't happen unless you've been doing a lot of thinking about it', and that, 'You can't build a career on [spontaneous revelations]'. Data from this research suggests revelatory influence is triggered by demand and urgency for a solution. Also, stimuli such as smell, a sound, hearing a particular word, or seeing a marketing brief, as well as having already thought about the project for some time may trigger a revelatory idea. However, these triggers appear to share the same un-determinable attributes, meaning that what may have triggered revelatory idea in one project may not necessarily work in another. Hence, while triggers have been identified here as provoking revelatory ideas, it is not clear whether one or another trigger may incite ideas in the future. One marketing specialist reported they had no 'light bulb' moment during their project. However, examining their specific responsibilities shows the burden of creative or innovative thinking was not upon them, but upon the project's marketing consultants instead. Therefore, one may deduce that demand and urgency for creative and appropriate solutions, may be prerequisites, or triggers, for revelatory influences to occur.

The following excerpts from a marketing consultant and a marketing specialist provide some insights into the qualities of revelatory influences:

“I think a lot of what you experience as a marketer is actually, it's the 'aha' moment when you get it yourself, **when you see it and it's the emotional interpretation of what you experience** and what you're trying to create for the person who's going to experience your message. **It's that!... It's that moment of truth.**” Parker: marketing consultant (C1:P5).

“I definitely can recall several moments of clarity or certainty when you realise that an idea, a way forward, a concept is ‘just right’ ... something becomes clear or clicks. It is an ‘aha’ moment that gives confidence/certainty of how to move forward. **It is a peaceful feeling in my gut that everything feels ‘right’** and or that an issue I have been grappling with – **I know how to progress further with.**” Carter: marketing specialist. Journal entry (C1:P3).

Carter describes above that when ‘aha’ moments occur, they bestow ‘clarity or certainty... an idea, a way forward, a concept is ‘just right’...confidence/certainty of how to move forward’. Parker describes the ‘aha’ moment as a ‘moment of truth’, a quality that means something more than aptness, but rather quintessential-ness, or absoluteness. Truth is defined in one dictionary as ‘a transcendent fundamental or spiritual reality’ (Merriam-Webster.com, 2015). The marketing specialist here recognises that the ‘aha’ moment is when ‘you get it yourself’ and realise that the people who will experience ‘your message’ will also ‘get it’.

The light bulb moment appears to provide a message so germane and absolute, that the marketing specialist is confident of its likelihood of being credible and persuasive with its audience. In other words, revelatory influences imparted ideas marketing specialists and consultants were confident would resonate with their project, their firm, and the market. In contrast, cognitive or informed judgements were described by the senior manager Corey as producing solutions that were ‘as right as you can be’. Corey also described the effectiveness of informed judgements as being within a band of linearity between customer data and their actual intentions. Therefore, while informed judgements served only to provide general direction for the project, revelatory influences provided the marketing specialist exactness, or ‘moment of truth’. In other words, the data suggest that revelatory ideas imparted superior logic, relevance, and resonance compared to those developed by cognitive or informed judgements:

“You need to have a **level of truth that you believe** you can deliver to and **also create a level of inspiration** that other people, as stakeholders, can work with... So, it’s authentic, it’s truthful, it’s aspirational.” Jordan: board member (C1:P1).

As shown, a revelatory idea is credited with providing a more fundamental and precise marketing message, which stakeholders are confident will resonate with its audience, compared to cognitive or informed judgements. Likewise, Logan the marketing consultant argues that the use of marketing methodologies alone will produce ‘ordinary’ outcomes:

“You can't guarantee anything with the creative process. You can apply any methodology you want **but if the muse and the inspiration and the insights don't bubble away** and generate something out of that you know you end up with something ordinary.” Logan: marketing consultant (C3:P1).

Here, Logan implies an imagined third person whose presence serves to excite or refine creative ideas. As Logan further asserts, the knowledge and application of creative processes sans any revelatory influence will likely produce a lacklustre result. One may ask if marketing specialist knowledge in and of itself can only provide broad answers to a firm's needs, what is the point of

employing marketing specialists? Why not just wait until a revelatory idea strikes? The data suggests the marketing specialist's knowledge domains, their cognitive abilities and proximity to critical data and expert stakeholders play a significant role in both recognising and testing revelatory ideas. This use of innate cognitive abilities, where both a deeper understanding of a topic and previously unrelated topics are somehow linked to arrive at a solution, is called insights. This definition of 'insights' is presumably what Logan is meaning. Therefore, the creative process, as described by Logan is the coalescence of methodology, muse, revelatory ideas, and insightfulness which results in something more than 'ordinary'. However, revelatory influences, despite their resounding qualities, are not guaranteed to eventuate.

The revelatory influences appear to have a transcendent nature ascribed to them by the participants. Logan, a marketing consultant who is also a musician, discusses the transcendent nature of revelatory influences in the context of song writing. In the following excerpt, he describes specific characteristics of a revelatory influence as being a something, i.e., 'the whole universe' and a someone, i.e., 'someone bigger':

“You know a lot of songwriters talk about yeah, you're actually tapping into the whole universe. **There's someone bigger than me that helps** songs appear.” Logan: marketing consultant (C3:P1).

Also, as Lane said regarding a revelatory idea in this section's introductory excerpt, 'it does seem like magic, and you go 'oh my God'. The bigger-ness suggests the revelatory influence had a much greater comprehension of the prevailing circumstances, and the ability to communicate an idea that imparted confidence to the hearer. However, although described as 'the whole universe' or a transcendent, metaphysical source, marketing specialists still apply critical thinking to the revelatory ideas. The following section describes how the marketing specialists and consultants decided whether or not a 'light bulb' idea should be adopted.

As discussed, the revelatory ideas typically arrived while the marketing specialists were not actively thinking about work. Upon their arrival, however, their thinking processes were activated to find fault with the idea. Here, while 'listening' to the 'moments of clarity', the marketing specialists and consultants were cautious before adopting the idea. For example, Carter would 'think critically' to test the 'light bulb' idea (C1:P3), to determine whether or not the idea was fit for purpose. This cognitive testing is where their knowledge, which the marketing specialists had accumulated from prior experiences and developed with their current context, research and consultations, came to the fore. Here, the marketing specialists evaluated the idea by running it past relevant criteria situated within their suite of knowledge domains and organisational objectives. An idea underwent tests from, for example, the marketing specialist's organisation familiarity, life experiences, market intelligence or the firm's objectives, to look for specific weaknesses. If following this mental probing, the idea remains intact it may be submitted to others for further evaluating:

“Yeah, **generally my reaction is it’s too good to be true**. Hang on, **I’ll go ‘what’s going to stop this from working’** and I immediately take a negative response to it. I go ‘oh that’s really good, what’s going to trip me up? What’s going ... what’s wrong with it?’ Your brain works very quickly in that situation going no, this... **you’re assessing things very, very quickly.**” Lane: marketing consultant (C3:P5).

“For me, **my response is to generally trust the moment of clarity – but also still think critically** to see that it is a genuine light bulb moment, rather than just wishful thinking!” Carter: marketing specialist. Journal entry (C1:P3).

In analysing the excerpts above, undertaking a critical thinking process to assess a revelatory idea has several implications. First, Carter distinguishes between the transcendent or genuine revelatory influence that she trusts, from her wishful thinking, ideas, or vain imaginations that she appeared not to trust. One may assume here that revelatory influences may take on a similar form or a familiar voice which may be easily confused with our intrapersonal communication. Second, Lane indicates his natural response to a revelatory influence is that ‘it’s too good to be true’. Despite implying both an external source and its uber-beneficial attributes, Lane is quick to question its integrity rather than immediately adopt it. Similar to Carter, Lane applies critical thinking processes where ‘your brain works very, very, quickly’ upon the idea’s concept or settings. This phrasing suggests that the entire idea arrives instantly, and that critical thinking also took place rapidly, testing each facet to see ‘what’s wrong with it?’ Here the marketing specialist’s knowledge served not just as criteria to develop ideas for marketing projects, but as probing instrument to dissect, scrutinise, and determine a suitable idea. Next, if the idea has merit or potential, Lane shares it with others for their input:

“Yeah, and some [ideas] are collaborative, **where I might come up with an idea which I think is great and I’ll mention it to someone else and they’ll go ‘what if you do this?’**, and you go ‘oh of course’.” Lane: marketing consultant (C3:P5).

Therefore, testing the revelatory ideas resulted in one of three outcomes: ideas were almost instantly and wholly adopted, promptly dismissed, or evolved from their original form. Here, Lane’s remark on this point is that 99 per cent of the time ‘there’s a seed of something else and that leads to something else’. This comment may mean that light bulb ideas are rarely arbitrary but may serve at times to provide only fundamental concepts to the marketing project. The case studies overall suggest that revelatory influence, cognitive and co-creative forces often all work together throughout the development of a marketing project, as Piper points out:

“Occasionally it can be a **blinding flash of light**, but usually, it comes through that discussion.” Piper: marketing specialist (C3:P3).

In sum, revelatory influences often occur during non-work times and non-work places; they also occur often when the marketing specialists’ minds are not ‘working as hard’. Although much research, thinking, discussion, and immersion into the project has occurred, this finding suggests idleness or distraction is also a frequent and necessary ingredient in project development. Also, revelatory ideas arrive spontaneously and provide clarity, creativity,

confidence, and certainty, or the seed of an idea. The marketing specialists subjected their 'light bulb' ideas to critical thinking processes before sharing the idea with others for further testing. Thereby, they are also either approved instantly, instantly dismissed, or provided elements which were further evolved. One marketing specialist sought inspiration using a muse, whereas others described its sudden and unexpected appearance. In general, revelatory ideas provided an exactness or preciseness, in part or overall, and resonance to a marketing project, compared to ideas developed from the marketing specialists' knowledge alone.

Along with the other practices discussed above, marketing specialist co-creative judgement-making was constituted with procedures, understandings, and engagements. Regarding procedures, the marketing specialists knew that they did not have all the information, insights, nor the confidence they needed to make informed and defensible decisions regarding their marketing projects' settings. Despite their depth and breadth of data, expert opinion, and experience, the marketing specialists possessed only notions or impressions of how their marketing projects settings would manifest. Hence, the marketing specialists knew that immersing themselves in research and thought-processes relating to their project's field and collaboration, e.g., workshops, would provide more comprehensive, expert or relevant data. These procedures would lead to robust findings and greater advocacy toward their marketing projects' settings

Concerning understandings, the marketing specialists knew how to draw out relevant information from internal and external sources as well as identify revelatory ideas and respond accordingly. Concerning the internal and external sources, the marketing managers understood how to discern the fundamental, authentic messages or data from the sources' feedback needed to develop their projects' settings.

Regarding revelatory influences, the marketing specialists trusted that the 'bolt from the blue' idea was on target, at least partly. However, concurrent with the revelatory idea's conception, the marketing specialists rigorously tested and refined it for appropriacy using critical and relevant benchmarks stored among their knowledge domains. Concerning engagements, despite their expertise, experience, and revelatory ideas with projects, the marketing specialists also relied on external cues and approval from relevant sources. The marketing specialists' skills involve formatting and embedding appropriate feedback within their projects' settings to imbue it with brand authenticity and resonance with the market. The procedures, understandings, and engagements of the practices of cognitive judgement-making are summarised below in Table 5.4.2.

Table 5.4.2: Co-creative judgement-making by constituent practices.

	Practices are constituted by:	
Procedures	Understandings	Engagements

	Def. Explicit rules, principles, precepts, and instructions, what is sometimes called discursive 'know-that' knowledge.	Def. Knowledge of what to say and do; skills and projects, sometimes called 'know-how' (i.e., tacit cultural templates for understanding and action).	Def. Linking ends, means, and moods that govern what makes sense to do beyond the procedures and understandings.
Marketing specialist Judgement-making	The marketing specialists knew that immersing themselves in research and thought-processes relating to their project's field and collaboration, e.g., workshops, would provide more comprehensive, expert or relevant data. These procedures would lead to robust findings and greater advocacy toward their marketing projects' settings	The marketing specialists knew how to draw out relevant information from both internal and external sources as well as identify revelatory ideas and respond accordingly.	Despite their expertise and experience with projects, the marketing specialists rely on external cues from relevant sources. The marketing specialists then format and embed these cues within their projects' settings to imbue it with brand authenticity and resonance with the market.

5.5 Summary

A review of relevant literature and the findings of this investigation thus far suggest that marketing specialist knowledge was comprised of five knowledge domains, each of which are constituted with practices. First, the marketing expertise knowledge domain consisted of the practices of conceptualising at the marketing specialists' level, consolidating at the firm level, and championing at the market level. Next, organisation familiarity comprised anchoring practices at the marketing specialist level and ingraining practices at the firm level. Third, market intelligence was constituted with the practices of calibrating at the marketing specialist level and prognosticating at the market level. Fourth, the knowledge domain of leadership contained the practices of facilitating and arbitrating, both at the firm level. Last, the marketing specialists' life experiences comprised of finessing at the marketing specialist level, fraternising at the firm level, and resonating at the market level.

The practices that constituted the knowledge domains further served the marketing specialist in their consulting, thinking, and judgement-making practices, which encompass cognitive and co-creative judgements. First, cognitive judgements are described as conclusions arrived at by the marketing specialist alone and are based on their experience, intuition, and insightfulness. Co-creative judgements, on the other hand, were developed alongside internal and external sources and revelatory influences which assisted the marketing specialists' decision-making regarding their projects' settings. The practices of consulting sources meant the marketing specialists collaborated with subject-matter experts or human resources who were either internal or external to the firm. These internal and external sources guided and assisted the marketing specialists during the marketing project; thus, it was hoped these sources would endorse and uphold the project they contributed toward. Next, marketing specialists' knowledge alone,

whether cognitive or co-created with various sources, was described as providing a broad direction or pathway in which the project might develop.

On the other hand, revelatory influences or ideas were described in terms of a metaphysical resource. For example, when a revelatory idea came, it occurred suddenly as a 'moment of truth', providing the marketing specialist clarity, creativity, confidence, and certainty once critically assessed. During an idea's appraisal, the marketing specialists' knowledge played a key role in testing and predicting each ideas' appropriateness, usefulness, and resonance.

In brief, this cross-case analysis chapter discussed the marketing specialists' knowledge and its constituent practices at the marketing specialist, firm, or market level. Moreover, the marketing specialists' thinking, and judgement-making practices were also discussed in light of their consulting practices with internal and external sources, or revelatory influences. Along with determining their practices, this research aims to link the marketing specialists' knowledge and their constituent practices to the marketing specialists' influence. Hence, this chapter's findings demonstrate how the marketing specialists' practices were located within knowledge domains, allied with consulting, and connected to the marketing specialists' thinking and judgement-making. Accordingly, practice theory provides a germane lens in describing how marketing specialist knowledge, consulting, thinking, and judgement-making is constituted; following on, Chapter 6 discusses how and why their knowledge was influential.

Chapter 6 Cross-case analysis of their influence

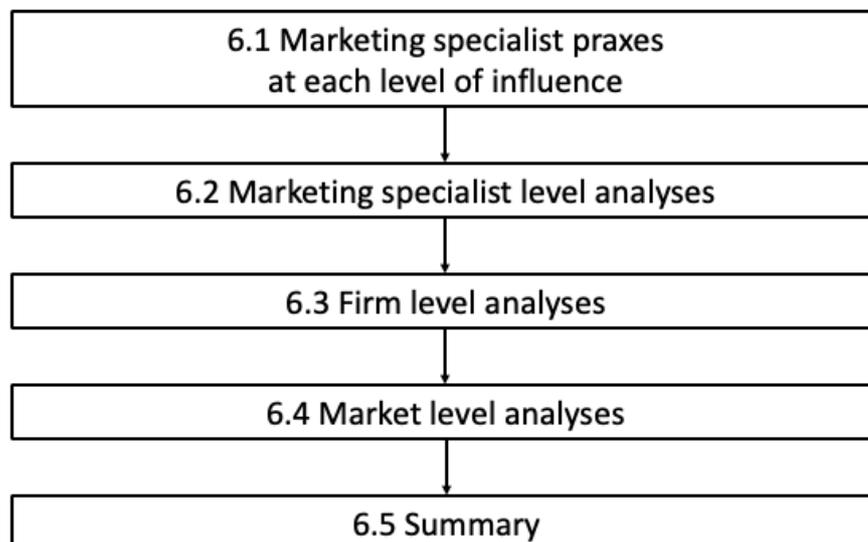
6.0 Introduction

This chapter examines RQ2, the influence of marketing specialists and their knowledge at three levels across the cases. Specifically, the second research question asks:

RQ2: How and why are the marketing specialists' praxes influential at the marketing specialist, firm, and market levels?

To answer RQ2, Chapter 6.1 discusses practice theory's approach to praxes and how it relates to this investigation of marketing specialists' influence. Next, Chapter 6.2 to Chapter 6.4 discuss the marketing specialist praxes and their influence found at the marketing specialist, firm, and market levels. Finally, Section 6.5 provides a summary to the topic, and how the findings answer RQ2. To summarise, using a practice theory approach, Chapter 6 completes this research's purpose by examining how and why marketing specialists' praxes influenced the marketing specialist, firm, and market levels.

Figure 6.0: Outline of Chapter six's topics of analysis



6.1 Marketing specialist praxes at each level of influence

Reckwitz (2002) argues practices are that which guide activity while praxes describe the activities themselves. Therefore, marketing specialist knowledge, which is constituted by particular practices, is drawn upon and processed to facilitate praxes which go on to influence the marketing specialist, firm, and market. Using findings regarding their practices in Chapter 5,

Chapter 6 identifies the marketing specialists' corresponding praxes and their influence at the marketing specialist, firm, and market levels.

Following the lead from previous studies, practices were presented in Chapter 5 as gerunds to highlight their active and constitutive nature (Jarzabkowski & Spee, 2009, p. 18). The praxes findings, however, form phrases made up of gerunds followed by the level where the activities were carried out, i.e., marketing specialist, firm, or market levels. For example, conceptualising was a gerund used to describe practices of marketing expertise at the marketing specialist level. Hence, cultivating their project's settings is the phrase which categorises the marketing specialists' praxes and subsequent influence at that level. Here, their marketing expertise (knowledge domain) led them to conceptualising (practices) which led to the activity of cultivating their project's settings (praxes) with other marketing specialists (level of influence). This format highlights the marketing specialists' praxes and influence by describing how and where their marketing specialist knowledge was carried out during their project, as well as who they influenced. Table 6.1 provides an overview of each of the marketing specialists' knowledge domains, practices, as well as their praxis phrases. An in-depth analysis follows.

Table 6.1: Overview of marketing specialists' practices and praxes at each level

Level	Practices and knowledge domain	Praxes	Description of the marketing specialists' influence
Marketing specialist level	Conceptualising using marketing expertise	6.2.1 Cultivating their project's settings	Marketing specialists were combining their skills and experience and managing project-related tasks with the aim of developing a viable creative proposition.
	Anchoring using organisation familiarity	6.2.2 Authenticating their project's settings	Marketing manager governed or regulated their marketing consultants' creative ideas or proposals toward consistency with their firm's branding, resources, and objectives.
	Calibrating using market intelligence	6.2.3 Mirroring their project's settings	Marketing specialists discussed their professional perspectives, instinct, and research on the target audience to make the project more appealing.
	Finessing using life experiences	6.2.4 Honing their project's settings	Marketing specialists were espousing their personal views to tweak various emotional aspects of their project's settings to increase the receptivity of their audience.
Firm level	Consolidating using marketing expertise	6.3.1 Engaging their firm	Marketing specialists' ability to connect with their firm's non-marketers and resources to involve them in the project.
	Ingraining using organisation familiarity	6.3.2 Knowing their firm	Marketing managers' productivity from understanding, meeting, relating, committing, and being accountable to the firm's personnel, stakeholders, and objectives.
	Facilitating using leadership	6.3.3 Enabling their firm	Marketing specialists empowered personnel and stakeholders by seeking their cogent viewpoints and using them as benchmarks or reference points.
	Arbitrating using leadership	6.3.4 Orienting their firm	Marketing specialists justified their decisions to detractors within the firm regarding their marketing project's settings.
	Fraternising using life experiences	6.3.5 Building rapport with their firm	Marketing specialists engaging respectfully and personably with others, which in turn gained the recipients' confidence and trust.
Market level	Championing using marketing expertise	6.4.1 Launching into their marketplace	Marketing specialists were judiciously applying a variety of marketing tactics to optimise their project's influence on the market.
	Prognosticating using market intelligence	6.4.2 Gauging their marketplace	Marketing specialists probed or anticipated their marketplaces' responses to proposed marketing offerings or changes to its settings.
	Resonating using life experiences	6.4.3 Emoting their marketplace	Marketing specialists were imbuing their project with pertinent emotive cues and messaging designed to instigate predictable responses.

6.2 Marketing specialist level

As shown in Table 6.1, four praxes cultivating, authenticating, mirroring, and honing were found at the marketing specialist level. The marketing specialist level describes the influence the marketing specialists, i.e., marketing managers, various marketing, advertising, or branding consultants, had on one another to develop their project's settings. As discussed in Chapter 4, the term 'project's settings' was a term used by several marketing specialists and it describes the attributes and adjustable components of each offerings' marketing mix. These 'settings' might include their project's concept, their brand's tagline, their product's price point, or livery colour, all of which can be adjusted throughout the process, even after the launch. Here, the marketing specialists would meet or workshop together at various stages to discuss the most effective characteristics, or settings, which would optimise their projects' effectiveness. Starting with conceptualising their project's settings, each praxis describes how marketing specialists influenced one another.

6.2.1 Cultivating their project's settings praxes

Based on the practices of conceptualising found at the marketing expertise level, marketing specialists influenced other marketing specialists using praxes categorised here as cultivating their project's settings. Cultivating their project's settings is a phrase that describes marketing specialists combining their skills and experience and managing project-related tasks with the aim of developing a viable creative proposition. After being selected to work together, cultivating their project's wide range of settings was typically the first phase in which the marketing specialists workshopped together. The following quote discusses several activities she employed when cultivating their project's settings. For instance, she wrote briefs, worked with agencies, determined key brand attributes, considered the firm's context and distilled data when cultivating aspects of the marketing project:

“[It's about] **how to work with creatives**, how to produce good creative work, how to write briefs, how to think about what the essence that the creative proposition is. How to think about 'Ok, we've got this client's situation, or this client challenge, what is the one sentence that sums up what we are trying to do?' **It sums up the key message for the campaign**. It's like the crystallisation of all the information we have into what is the one fundamental thing we are trying to communicate here.” Piper: marketing manager (C3:P3).

Piper engaged her own, as well as third-party, marketing expertise to distil the project's brief in order to cultivate the project's purpose and message. The key activities, repeated throughout the findings, are engaging with agencies, producing concepts, writing briefs, and thinking about proposals. In another case, a marketing consultant described how the marketing manager assigned them 'desk research' (C1:P2) early in their project's process to determine competitive

benchmarks. These activities have been summarised as cultivating the project's settings and were typically the first form of influence the marketing specialists had among one another.

The praxes of cultivating their marketing project's settings drew from marketing expertise, or more specifically, their practices of conceptualising. In other words, the marketing specialists worked together to develop their project's fundamental elements and purpose, listening to and challenging each other's experiences, research, and proposals. A significant marketing specialist activity was cultivating their project's settings to accurately reflect contingencies such as their market's needs, their firm's resources, or their offering's unique and appealing attributes.

6.2.2 Authenticating their project's settings

Alongside the early phase of cultivating their project's settings, the marketing managers influenced their marketing consultant colleagues by authenticating their project's settings.

Authenticating their project's settings was based on the marketing specialist practice of anchoring, which was found within the knowledge domain of organisation familiarity.

Authenticating their project's settings describes how the marketing manager governed or regulated their marketing consultants' creative ideas or proposals toward consistency with their firm's branding, resources, and objectives. As mentioned, authenticating their project's settings usually accompanied the cultivating phase although it focused on the project's settings specifically related to their firm.

From the data collected, senior personnel from different cases expressed their desire for marketing projects to accurately represent their organisation. Phrases they used to describe a project's fidelity to their firm's branding were 'be true and authentic for [our firm]' (C3:P2), and '[The resulting project is] authentic, it's truthful' (C1:P1). In the following excerpt, a marketing consultant who works predominately in the creative area described how a marketing manager's organisation familiarity moderated a creative consultant's ideas:

“Creatives sometimes need to be reined in, and I include myself in that. I've got my enthusiasms and I'll come up with an idea I think is great. And a good marketer will go 'calm down, it doesn't feel like our brand because...'. ...It's them having a really good feel for what the brand stands for, because they live within that culture and they bring a marketing perspective to it.” Lane: marketing consultant (C3:P5).

As Lane explains, the marketing manager will not only restrain the creative consultant's idea but will, using specific attributes of the firm's branding, clarify why. The praxes of authenticating their project's settings influenced the marketing specialist level and was a subset of cultivating their project's settings due to its focus on their firm's characteristics. However, the marketing manager's focus on making their project's settings align with their firm's branding was highlighted as critical to participants at the board, senior manager, and third-party consultants alike.

Authenticating their project's settings were praxes that drew upon the marketing manager's practices of anchoring situated within their organisation familiarity knowledge domain. As discussed, marketing managers influenced or guided marketing consultants toward creative solutions befitting their firm's branding, resources, and objectives. Findings relating to the praxes of authenticating their project's settings provide a strong argument for firms who rely on marketing projects to employ and involve marketing managers.

6.2.3 Mirroring their project's settings

From the marketing specialists' practices of calibrating, which drew from their market intelligence knowledge domain, marketing specialists influenced one another with praxes termed here as mirroring their project's settings. The phrase mirroring their project's settings describes how marketing specialists discussed their professional perspectives, instinct, and research on how to make the project more appealing to their target audience. Here, mirroring contrasts with authenticating as the marketing specialists' main focus is on their project's market appeal rather than branding cogency.

The following excerpt provides an example of how findings from one firm's market research might be used to alter a project's settings to appeal to their audience's tastes:

“[Market research] come to us with, **‘this is what the consumer wants’**, and then we have to work with the other side of the business, the innovation team, the scientists, [other stakeholders] and say, **‘this is what they want, can we do it?’**” Rowan: projects manager (C2:P3).

As shown, there is a line of influence from the market to stakeholders via the market research consultants and marketing department. The sequence of evidence and influence was necessary to justify adapting the settings of their current offering, which in this case was a multi-million-dollar multi-national process implemented over several months. Nonetheless, before their market research or changing their project's settings, the marketing specialists approach to mirroring their project's settings was best summed up by this marketing consultant's rhetorical question:

“How do we mirror what we know is going to be engaging to a consumer and make [our firm's marketing project] relevant to our consumers?” Kelly: marketing consultant (C1:P2).

In this case, the marketing consultant believed that their project's settings should accurately reflect, or mirror, critical attributes of their offering to pique their target audiences' interest. As the marketing consultant suggests, while knowing what an offering's key attributes is critical, knowing how to present that attribute to motivate an audience is more so. Further, market intelligence was used to determine changes to other project settings including updating livery (C4:P1), changing the product's taste (C2:P3), competitive pricing (C3:P3), and market segmentation (C3:P2). As discussed, these activities have been categorised as mirroring their

project's settings so that firms are assured their marketing project reciprocates its target market's current preferences.

The praxes of mirroring their project's settings drew from the marketing specialists' practices of calibrating which is located in the market intelligence knowledge domain. As discussed, here the marketing specialists influenced one another with their perspectives, instinct, and research about the target audience to make their project more appealing. The marketing specialists access to market data and focus on converting market intelligence into creating relevant offerings and persuasive messages made their roles distinct and valuable to their firms.

6.2.4 Honing their project's settings

The final praxes marketing specialists used to influence one another, drew from their practices of finessing at the life experiences knowledge domain and is categorised as honing their project's settings. While previous praxes drew from their marketing expertise and familiarity with their firm and market, honing their project's settings considers how their life experiences were also influential. Honing their project's settings describes the marketing specialists espousing their personal views to tweak various emotional aspects of their project's settings to increase the receptivity of their audience. Unlike the praxes discussed already, honing their project's settings typically occurred toward the end of the project, just before the publishing of their marketing collateral.

The following excerpt describes a dialogue between a creative consultant and the marketing manager as they consider the different emotional cues of spoken and written words in their promotional material:

“For example, in the original script the couple kiss at the end, to show they've come together and they've fallen in love. It's always been there in the script, but two days before we started shooting, I rang up and said, 'I don't want this kiss, **it's overstating it, it's not as sweet or as nice as them simply holding hands**. It's a more innocent thing. There's something less sexual about it, it needs something that is actually nicer'. So, **[the marketing manager] listened to that and went, 'yes I understand why that's going too far'**. Then I called her back ten minutes later and said, the voiceover says, 'great things happen...' and **I think the word 'great' is too strong. It should be 'good'**. She listens to the reasons why **agrees but says, 'I want to keep 'great' on the posters because I think in a print media, 'great' is going to look stronger than 'good'**". **I went, 'yes, okay I agree with that'**. So, **that's a constant evolution of very small things**, and that happens all the way through. **That's honing...**” Lane: marketing consultant (C3:P5).

As shown, both Lane and the marketing manager were sensitive to how audiences might respond to the characters and words in their marketing collateral. Interestingly, neither took issue with the billboards saying 'great' while the TVC said 'good', suggesting they felt the emotional cues were more conspicuous and necessary than a consistent tagline. In another case, a senior manager describes how their marketing manager persisted with their TVC voiceover actor's takes until those present said, 'Ah, we've got it.' (C1:P4). During the process, the marketing manager coached the actor, 'till the delicacies of the lifting of the voices at certain spots and having exactly the

right type of... voice' (C1:P4). These aspects of the marketing specialists, called honing their project's settings, were critical in developing each project's emotive messaging.

In sum, the praxes of honing their project's settings drew from their life experiences, and specifically their practices of finessing. Here, the marketing specialists worked together, drawing from their empathy and humanity to address and re-address their projects' emotional cues to position their firms' messaging in the market productively. Here, the market specialists' personal experiences played a significant role in project development, likely making each project unique.

6.2.5 Summary of the four praxes at the marketing specialist level

To summarise this section on influence at the marketing specialist level, the four praxes identified demonstrate various phases of the project in which the marketing specialists influenced one another. Praxes describe the activities that practitioners carry out. First, the marketing specialists began by cultivating their project's settings by researching and discussing with each other various creative concepts and proposals. Here, the marketing specialists drew from their practices of conceptualising from their marketing expertise to create among themselves a viable 'creative proposition' (C3:P3). During this time, the third-party marketing consultants pitched creative ideas while the marketing manager determined how consistent their ideas were with their firm's branding, resources, and objectives. Second, categorised as authenticating their project's settings, the marketing managers drew from their practices of anchoring from their organisation familiarity. In doing so, internal and external understandings and perspectives of the marketing specialists helped develop both original and appropriate settings for their projects.

Third, the marketing specialists would also discuss with each other how to capitalise on their project's market appeal. Called the praxes of mirroring their project's settings the marketing specialists would draw from their practices of calibrating from their market intelligence knowledge domain. By understanding their target audience, the marketing specialists would collaborate to creating offerings and subsequent promotional messages that reciprocated their market's current preferences. Fourth, to make sure they were more than technically accomplished, the marketing specialists would iterate on the human aspect of their marketing projects. Categorised here as honing their project's settings, these praxes drew from the marketing specialists finessing practices found within their life experiences. Before the launch, the marketing specialists would discuss with each other the emotive aspects of their project's messaging and the responses they were trying to elicit from their audience. In doing so, the marketing specialists tuned into their human-ness to determine if and how the market would respond to the emotional cues within the project. Honing their project's settings had the marketing specialists justifying changes to the finer, 'delicate part' (C3:P5) of the sounds, scripting, or any potentially emotionally-tuned aspects of their project. By doing so, the

marketing specialists addressed their projects' emotional cues to increase their offering's chances of engaging with and motivating its audience's responses.

In sum, four praxes were categorised within the marketing specialist's level. Whether internal or external to the firm, marketing specialists influenced one another to develop an effective marketing project. The praxes of cultivating, authenticating, mirroring, and honing their project's settings describe how the marketing specialists influenced one another with specific practices drawn from particular knowledge domains. Here, the marketing specialists drew from their knowledge to make their project fit for purpose from a marketing, firm, market, and human perspective respectively. By applying what they knew about each of these areas, the marketing specialists were able to workshop with each other productively, as they produced their projects.

6.3 Firm level

As shown above, in Table 6.1, five praxes, engaging, knowing, enabling, orienting, and building rapport emerged at the firm level. These praxes categorise the marketing specialists' influence among their firm's personnel, management, stakeholders, and board members during the project. Similar to the workshops and communication processes the marketing specialists conducted with each other, the marketing specialists also centralised communications with their firms by running workshops and holding meetings. Moreover, the marketing specialists often visited or roved around their firm or wherever their stakeholders were to maintain contact and influence. Beginning with engaging with the firm, each praxis describes how marketing specialists influenced their firm.

6.3.1 Engaging their firm

Following their practices of consolidating found at the firm level, marketing specialists influenced their firm using praxes named here as engaging their firm. Engaging their firm describes the marketing specialists' ability to connect with their firm's non-marketers and resources to involve them in the project. Developing their marketing project solely on the perspectives of other marketing specialists significantly increased the risk of the project being both irrelevant and ignored by personnel and stakeholders. However, involving staff and stakeholders was also risky, particularly with non-marketers being either disengaged or domineering. Considering these risks, engaging with their firm was influential as marketing specialists drew in the perspectives of others to gain further insight and foster consensus.

In the following excerpt, Corey was impressed with the marketing specialist's approach and willingness to engage with their firm for the sake of the marketing project:

“Just [the marketing consultant's] **ability to engage with us**... What he was saying was ‘I know how to take you through the process, and **I'll make sure that we tap into the**

thinking and resources that are available within [your firm].” Corey: senior manager (C3:P4).

Corey recognises that engaging with their firm is critical to not only resourcing their marketing project but increasing the market orientation of the firm. Engaging their firm does not infer broken linkages with non-marketing personnel, as another marketing specialist put it ‘it’s about bringing them along with you to’ (C2:P5). These influential praxes included gathering the expertise, perspectives, and material resources available within the firm to test and develop strong ideas as well as garner unity. To influence this level, the marketing specialists conveyed their project's purpose and importance with non-marketers and acquired their approvals and resource capabilities for the project.

The praxes of engaging their firm was drawn from their marketing expertise knowledge domain, or more specifically their practices of consolidating. Here the marketing specialists worked with personnel and stakeholders within the firm to gain their accord, their perspectives, and resources to assist in incorporating a relevant marketing project. Without assimilating the firm’s non-marketing personnel consensus and collateral, their marketing project would have fallen far short of its potential. Hence, engaging with their firm was a crucial and carefully applied influence in which the marketing specialists moderated or market-oriented stakeholders, who may have been otherwise disengaged or domineering.

6.3.2 Knowing their firm

As well as praxes relating to engaging with their firm, the marketing specialists were influential by knowing their firm. As a gerund, knowing their firm describes the marketing specialists’ productivity from understanding, meeting, relating, committing, and being accountable to the firm’s personnel, stakeholders, and objectives. Although knowing shares similarities with engaging, knowing the firm relates specifically to the marketing specialists’, particularly the marketing manager’s, endeavours to understand the firm, its personnel, stakeholders, and its objectives. In other words, the influence in knowing their firm is more relationally-driven than engaging their firm’s more practical approach and purpose.

In the following excerpt, Rowan describes some of the activities of marketing managers who were proficient in knowing their firm:

“[Two particular marketing managers have] been in the business for a lot longer than I have, so **they’ve developed relationships over time; understand what the hot points are** in peoples’ minds; **understand what the scepticism might be about** some of the things we’re doing in the [market place]. But **they also understand what [our firm is] doing in the [market place] and the strategy behind it.**” Rowan: projects manager (C2:P3).

Rowan asserts that, due to the depth of familiarity the marketing specialists have with the organisation, its stakeholders, and its strategy, they can implement marketing initiatives more

effectively. Hence, participants describe how knowing their firm helped their marketing managers anticipate objections and implement useful and acceptable marketing initiatives. As a participant from another case put it, the marketing managers are, 'building the relationships with the people that you work with to get mutual results' (C3:P6). Or, from another case, the role of the marketing manager, 'it's a commitment. It's a conscious decision to be part of a team, to be part of a strategy, to take accountability' (C1:P1). Therefore, concerning being influential, the praxes of knowing their firm imply a level of relational connections that engender symbiotic and mutually beneficial relationships.

The praxes of knowing their firm drew from their practices of ingraining which resided in their organisation familiarity knowledge domain. Knowing their firm describes the relational connection with their firm rather than their practical one. Regarding their influence in knowing their firm, analyses of their praxes strongly suggest the marketing managers' relational connection within the firm was a vital determinant toward reaching their projects' objectives. Hence, the praxis of knowing their firm is a good reason for firms who rely on marketing projects to engage marketing managers at their helm.

6.3.3 Enabling their firm

Drawing from the practices of facilitating from the knowledge domain of leadership, another praxis the marketing specialists used when influencing their firm is categorised here as enabling their firm. Enabling the firm describes how marketing specialists empowered personnel and stakeholders by seeking their cogent viewpoints and using them as benchmarks or reference points. Moving beyond the praxes of engaging with personnel to connect and involve them in the project, enabling their firm meant the marketing specialists valued and implemented their feedback. In doing so, the marketing specialists developed settings that represented their firm's voice while simultaneously gaining consensus toward their project.

To provide a background to the following excerpt, the marketing specialist had discussed the marketing project with frontline staff to seek their feedback and consensus. During the workshop, one of the frontline staff provided a phrase that was to become a cultural benchmark for their firm:

“The brand promise or [our firm's] strategy... **came out of the mouth of a hard case [frontline staff member]** ...and all the hard case, cynical, [frontline staff members] all loved it. It made sense to them and it was supported by all these values... **And because it came from them, they loved it.**” Logan: marketing consultant (C3:P1).

By enabling frontline staff in the development stages of the marketing project, Logan elicited essential feedback for the project and gained the frontline staff's support. Here, the marketing specialist was influential in two ways. First, the marketing specialist introduced their workshops or brainstorming sessions with a lesson on branding, thereby increasing their personnel's understanding of marketing. Second, by having staff suggest marketing themes, the marketing

specialist influenced their level of consensus to the marketing project. The marketing consultant discussed why he adopted this democratic approach, 'It's a consultation and getting people on board, as much as an exploration thing' (C3:P1). Looking further, Logan suggests it would be likely that marketing specialists may have developed similarly efficient phrasing; however, it might not have been as readily accepted. Hence, the marketing specialists were enabling their firm when they identified and implemented a compelling brand promise after it 'came out of the mouth of a hard-case [frontline staff member]'.

The praxes of enabling their firm drew from marketing specialist practices of facilitating which in turn is found in their leadership knowledge domain. Enabling the firm has similarities to mirroring their project's settings, but instead of the prioritising market's voice, the marketing specialists gave heed to their firm's voice. Further, marketing specialists aimed to gain consensus as well as collect and explore previously unknown views and expertise. Overall, enabling their firm sought to influence the firm by educating the firm about marketing, capturing the firm's most compelling ideas or phrasing, and eliciting consensus toward their marketing project.

6.3.4 Orienting their firm

Likewise, from the knowledge domain of leadership, the marketing specialists drew from their practices of arbitrating when orienting their firm. The praxes of orienting their firms were necessary as evidence from each case found various ways in which stakeholders detracted from their marketing project settings. Therefore, orienting the firm describes how the marketing specialists justified their decisions and realigned detractors toward adopting their marketing project's settings. In contrast to enabling the firm, which empowered personnel and stakeholders' voices, orienting the firm served to check or align those who resisted their marketing project's proposals or settings.

When orienting the firm, marketing specialists in each case used several approaches to orient or drive behavioural change within the firm. As discussed by a board member, a marketing specialist's leadership can be an influential, or market-orienting force:

“[The right marketing manager] can bring in practical, experiential knowledge and expertise to then **embed that knowledge and capacity within an organisation** and **help an organisation realign or refocus.**” Jordan: board member (C1:P1).

Another approach used by marketing specialists when orienting their firm was using the voice of the market:

“**It's translating market signals back to the [key stakeholders]** and trying to **drive [the key stakeholder's] behaviour** to deliver what the market wants.” Rowan: projects manager (C2:P3).

Furthermore, as well as using their market's voice, the stakeholder's were used to orient the firm. For instance, after consulting stakeholders and personnel to assist in establishing the firms brand promises and values, the marketing specialist would then hold the staff accountable to keep them:

“We made it really clear to people to say, ‘Hey look [**these cultural benchmarks we have decided upon**] **are just not words** that are just going to sit on a document..., **these are going to be built into [your] job descriptions.**” Casey: marketing specialist (C4:P1).

Moreover, in another case, the marketing specialists had also collaborated with their firm's personnel and developed brand values and promises. Corey, a senior manager, describes how the new brand values and promises provided both a test and a compass which will orient the firm in future marketing decisions:

“**[The internal brand promise] provides a test...** And we do ask ourselves that, ‘I think we should do X, but does that fit with brand promise? Yes/No?’ ...So, I guess **it’s a compass**, it may be a way to describe it.” Corey: senior manager (C3:P4).

Apart from the market and stakeholder voice, the marketing specialists also oriented the firm through planning. For instance, Kelsey a senior manager describes how their marketing manager ‘would very clearly state the path in which we needed to go’ (C1:P4). Kelsey suggested that this approach acclimatised stakeholders to organisational change and provided assurance and clarity to senior managers. As shown, using leadership, the market’s voice, the voice of the firm, and marketing plans, the marketing specialists were influential in orienting their firm.

The praxes of orienting their firm drew from the practices of arbitrating, which reside in the marketing specialists’ knowledge domain of leadership. As shown, using various approaches, the marketing specialists influenced the misaligned or detractors within their firm into complying with their project’s settings. Orienting their firm provided decisive praxes which conceivably influenced their whole firm, including senior managers and board members, despite the marketing managers’ mid-level or the marketing consultants’ external role.

6.3.5 Building rapport with their firm

From their practices of fraternising, which they drew from their life experiences, the marketing specialists influenced the market with praxes categorised here as building rapport with the firm. From the data collected, participants discussed how the marketing specialists were influential due to their professional and amicable manner with others in the firm. Therefore, building rapport with the firm is described as marketing specialists engaging respectfully and personably with others, which in turn gained the recipients' confidence and trust. Across the cases, the marketing specialists default means of addressing others was to approach them in a friendly, likable, and respectful manner.

Building rapport with their firm was critical praxes which provided the marketing specialists with a particular form of respect and influence throughout the firm. As the following senior manager confirms, building rapport is distinct from marketing expertise:

“I think you can have all the education under the sun but if you don’t deliver it well... **understanding the people factor**, you can be all great in theory, but in the practice of it, it can be all wrong.” Kelsey: senior manager. (C1:P4).

Apart from being personable and respectful, another key identified by participants was the confidence the marketing specialists had with both their ideas and their professional manner toward others:

“To be able to conduct a meeting or to be able to pitch an idea to someone or confidence to be able to, **just to have that confidence** I think.” Casey: marketing specialist (C4:P1).

Having confidence was identified as a crucial means of influence as his board member also testified, ‘he's gained our confidence... he's a very personable guy; he's a very confident guy' (C4:P7). Here, the marketing specialist's confidence proved influential in providing the board member confidence in the marketing project. Conversely, demonstrating uncertainty in his project's pitch would have likely resulted in the board not approving the project. Apart from being personable, respectful, and confident, the following excerpt demonstrates how marketing specialists had to be prudent in managing workshops with stakeholders and personnel:

“Because **if you open up [the discussion on branding] too wide**, you end up going back to square one again and having a second discussion. But **if it's too narrow** people feeling a bit like they're being managed too much. So, **there is a subtle skill in there...** It's **making sure that people felt like they were a part of it all the way along, but still controlling the processes' outcomes that you wanted.**” Jesse: senior manager (C4:P2).

As shown, Jesse describes a ‘subtle skill’, where subject-matter expertise and consensus from stakeholders is acquired by the marketing specialist, without relinquishing control over the marketing project. By using this ‘subtle skill’, people throughout the firm felt their input was being respected while the marketing specialists carefully navigated the workshop or discussion toward a mutually beneficial conclusion. Categorised as building rapport with their firm, each marketing specialist’s approach was unique, its influence provided confidence and gained consensus with personnel and stakeholders.

The praxes of building rapport with their firm drew from the market specialists’ life experiences, specifically their practices of fraternising and were crucial in projects’ development, approval, and implementation processes. The marketing specialists approach to building rapport with their firm differed with one another, due in part to their differing personalities. However, the evidence strongly suggests that the marketing specialists’ rapport was critical due to its influence in unifying personnel and stakeholders around their marketing

project. As the above excerpts demonstrate, due to the humanity of organisations the marketing specialist's personable skills and manners were crucial throughout the marketing project process.

6.3.6 Summary of the five praxes at the firm level

By investigating, collating, and categorising the marketing specialists' influence at their firm, five praxes became evident. A cursory look might suggest that one praxis is much like the other, due to their shared relational themes. However, a closer examination uncovers distinct and subtle cues on how the marketing specialists influenced personnel and stakeholders across the echelons of each firm, for the sake of their project. Regarding the praxes of engaging their firm, the marketing specialists were able to enlist their firm's views, resources, and ultimately their consent. Similarly, when knowing their firm, their accountability and understanding of others in their firm increased their capacity to influence them. Following on, the marketing specialists moved to enabling their firm by using the compelling ideas and perspectives they had collected to provide the firm's voice to their project's settings.

However, while the above three praxes appear to capture both relevant settings, resources, and goodwill toward their marketing project, the marketing specialists also influenced the discordant by orienting the firm. To protect the direction and integrity of the marketing project, the marketing specialists would confront and re-orient the views of dissenters by producing evidence from market research or expert opinion. Moreover, the marketing specialists supplemented their influence throughout the firm by building rapport with their firm, thereby being personable, respectful, and confident in their interactions. The praxes of engaging, knowing, enabling, orienting, and building rapport with their firm, describe how marketing specialists contributed valuable, effective, supportive, and forcible influences throughout their firms.

6.4 Market level

As shown above, in Table 6.1, the three praxes launching, gauging, and emoting were found at the market level. The market level describes the marketing specialists' influence, via their marketing project, on their target audience and competitors. In other words, unlike their interactions with marketing specialists, personnel and stakeholders, the marketing specialists' influence on the market was mainly indirect. Beginning with launching into the marketplace, each praxis describes how marketing specialists influenced their target audience and competitors.

6.4.1 Launching into their marketplace

Using their marketing expertise, and drawing from their practices of championing, marketing specialists influenced their market using praxes categorised here as launching into their marketplace. Launching into the marketplace describes the marketing specialists judiciously applying a variety of marketing tactics to optimise their project's influence on the marketplace. Here, the marketing specialists ascertained their marketplaces' opportunities or pitfalls, including their projects' advantages over their competitors, and optimised their projects' settings accordingly.

Launching into their marketplace consisted of several principled approaches. In the first example, Jordan describes their marketing specialist targeting their firm's intended audience:

“[The marketing project is] delivered in a way that we've also **targeted a key group**.”
Jordan: board member (C1:P1).

In another case and using another approach, Rowan discussed the importance of upholding the brand promises, or the pitfalls of lapsing, in any interaction with the market:

“We've gone out and built a brand and invested a lot of money in it, and if you're not **delivering on the brand promise**, then the brand quickly loses its credibility.” Rowan: projects manager (C2:P3).

In the following example, the marketing specialist adapted their marketing project's tagline and collateral temporarily to merge and leverage from a national reality television show. However, the purpose, look, and feel of the marketing project remained consistent with their branding:

“That's what you call fantastic **leveraging** and... doing the right thing with nothing, you know? You could hail that a great success and that's **a fantastic thing for a campaign that's able to be adapted straight away to do that**.” Parker: marketing consultant (C1:P5).

Concerning leveraging, Parker discusses how smart, successful, and economical the marketing specialist's adaptation of their recently launched marketing project was. These approaches of targeting their audience, delivering on brand, and leveraging from opportunities were only some of the activities the marketing specialists employed when launching into their marketplace. Other approaches such as timing and the defending of their marketing projects, against competitor litigation, for example, were also evident from the cases. These kinds of marketing activities, categorised as launching into their marketplace, were carried out to improve and position their projects more advantageously within the market.

The praxes of launching into their marketplace drew from their marketing expertise, or categorically, the marketing specialists' practice of championing. Here, the marketing specialists were uniquely positioned to ascertain their market and, using their marketing

expertise, adjust their projects' settings to maximise its influence, and their firms' return on investment.

6.4.2 Gauging their marketplace

From the marketing specialists' practices of prognosticating, which drew from their market intelligence knowledge domain, marketing specialists influenced their market with praxis termed here as gauging their marketplace. Gauging their marketplace describes how marketing specialists probed or anticipated their marketplaces' responses to proposed marketing offerings or changes to its settings. Concerning probing, the marketing specialist sought their target market's responses to the marketing project pre- and post-launch to appraise their predictions.

As the following excerpt discusses, Piper had surveyed the marketing project after its launch, using direct marketing to gauge the marketplace's receptivity:

“We did a test and the results from that were really positive in terms of customer uptake so **that confirms that this actually was a very good offer** that people were going to respond to.” Piper: marketing specialist (C3:P3).

Despite gauging their marketplace for their audiences' perspective on their first marketing project, the same marketing specialist described how they decided not to test their second marketing campaign. This time, the marketing specialists anticipated the market's response to the project's settings, specifically their television commercial, without testing it first upon focus groups. Here, the marketing specialist describes in the following excerpt their confidence that the market's response would be positive:

“I loved [the TVC concept], [the senior manager] loved it, the [creative consultants] loved it, we were already talking to the TV director... he loved it. We were sort of like, ‘if the [creative consultants] love it, if [the senior manager] loves it, if I love it – **why are we in these jobs if our knowledge and feelings about this aren't valid?** We shouldn't actually be making these decisions if all of us have got this wrong. We don't deserve to be in the jobs if it's wrong. So, we went, ‘No, we're not going to concept test this.’ We are just **going to go for it because we all believe in it.**” Piper: marketing specialist (C3:P3).

By not testing the TVC concept using focus groups, the firm was able to save time and money. In a sense, the marketing specialists were gauging their target market's response using their intuition. In another case, the following excerpt provides an example of how Casey used social media to appraise the market's post-launch response to the rebrand:

“[The social media response was] ‘So cool guys, it's looks great, it's looks modern’. Not one negative. And social media, that's really unusual. It was just **this validation from people saying, ‘It's great’, Oh love it, cool.**” Casey: marketing specialist (C4:P1).

Whether anticipating or testing their projects' setting pre- or post-launch, these activities were categorised as gauging their marketplace, which describes another way the marketing specialists indirectly influence their market. Specifically, by calculating the optimal settings for their

marketing projects, by whichever means, the marketing specialists increase the likelihood of market and competitor response.

The praxes of gauging their marketplace drew from marketing intelligence, or more specifically, their practices of prognosticating. As well as influence their market, gauging their marketplace provided the marketing specialist influence to make further marketing project decisions post-launch. Here, by gauging their marketplace, the marketing specialists gained a market perspective which either validated their project's settings or provided leverage to make changes. In sum, the examples show how marketing specialists were gauging their marketplace to reflect the consumers' preferences and intentions to optimise their marketing projects' settings.

6.4.3 Emoting their marketplace

Based on the practices of resonating found at the market level, marketing specialists influenced other marketing specialists using praxes referred to here as emoting their marketplace. Emoting their marketplace describes the marketing specialists imbuing their project with pertinent emotive cues and messaging designed to instigate predictable responses. Although emoting the marketplace is the last praxe described here, the evidence suggests it was one of the first issues or concerns the marketing specialists were cognisant of when briefed about their project.

The following excerpt from Casey describes how marketing specialists must understand their market if they are to influence or motivate them enough to buy:

“**Understand what motivates people** and what doesn't... I think to a certain extent is a core function of marketing.” Casey: marketing specialist (C4:P1).

In the following excerpt, Jordan measures a marketing specialist's competencies based on their ability to emote the marketplace. Jordan asserts the difference between a good marketing specialist and a great one comes from having a feel for the market, rather than a comprehensive set of marketing skills:

“I suppose it's about **how plugged in you are to the consumer**. It is how plugged in you are to the market. It's like the great stockbrokers and those guys. They've got a feel for what's going on. And some people have it and some people don't. And I know really good specialist marketers who I know will get a good job done and I know **others with the same skill set who have done the same things who will do a great job.**” Jordan: board member (C1:P1).

Jordon infers being 'plugged in' means some marketing specialists can produce offerings that motivate their market. During a focus group, Mason a frontline staff member from one case described how their marketing message resonated with their potential customers due to its emotional tones:

“I think **price** is part of it that captures their attention, that gets us into their consideration set. But that I think there is **a whole lot of work that this [marketing project] has done in the background** to really enforce that, ‘Hey we are the good

guys, we're not just out to acquire you for a short time. It makes sense to have a long-term investment with [us]" Mason: sales manager (C3:P7).

Although Mason acknowledged that low pricing resonates with consumers, she believed their marketing project tapped into other, more holistic values that further motivated customers toward buying decisions. Mason suggests that the market seriously considered the offer not on pricing alone, but on an emotional connection also. Lane puts it this way:

"Building an emotion in people's brains so they feel something for the brand, rather than just the immediate concerns of achieving a financial goal." Lane: marketing consultant (C3:P5).

The above activities of marketing specialists were categorised as emoting their marketplace. When deciding their projects' settings, marketing specialists use their innate skills, abilities, and their personalities to infuse it with predetermined emotional cues. The praxes of emoting their marketplace drew predominately from the marketing specialists' life experiences, or more specifically, their practices of resonating. Due to its subtleties, some marketing specialists were described as better at these praxes than others. Therefore, the marketing specialists' ability and influence in emoting the marketplace is determined singularly yet recognised universally. In sum, emoting their marketplace was critical, not only during the marketing project but particularly upon the feelings their target audience had toward their firm's brand in general.

6.4.4 Summary of the three praxes at the market level

The praxes discussed above, launching, gauging, and emoting with their marketplace, follow the order of how the marketing specialists' knowledge domains and their practices were categorised. However, the marketing specialists worked on these activities in the reverse chronological order. Generally speaking, the marketing specialist first considered how emoting their marketplace would be carried out. Here, the marketing specialists drew from their practices of resonating which were found in their life experiences knowledge domain. By imbuing their marketing project with emotional cues, the marketing specialists intended to influence their audiences' feelings toward their marketing project and their firm's branding.

Next, gauging their marketplace was carried out so that marketing specialists could determine how their audience and competitors responded to their projects' settings. Here, the marketing specialists drew from their practices of prognosticating, found within their market intelligence knowledge domain. By anticipating or probing their markets' responses to their marketing projects, the marketing specialists were able to determine if their projects' setting may be optimised further. Finally, launching into their marketplace demonstrated how the marketing specialists used their marketing nous to enhance their projects' settings to optimise their influence on their market. Here, the marketing specialists drew from their practices of championing, which was found within their marketing expertise knowledge domain. By

applying their marketing expertise, the marketing specialists were making informed decisions on how to adjust their projects' settings toward its optimisation and maturation.

Overall, their focus and activities within each of these praxes meant that the marketing specialists' influence, or more specifically their projects' influence, would be optimised on the marketplace. As shown, among all those involved, the marketing specialists were trained, positioned, and capable to cause their marketing projects to be a positive influence upon their marketplace.

6.5 Summary

While the marketing specialist's practices describe what guides their activities, Section 6.2 to 6.4 provided an analysis of their praxes and the influence they had at each level. Below, Table 6.5 provides a summary of each of the marketing specialists' praxes under the knowledge domains and practices from which they were drawn. By discussing the praxes categorised under their knowledge domains, the variety of discipline-based, people-based, and project-based influences that their knowledge resources become apparent.

First, marketing specialist expertise goes on to influence other marketing specialists while cultivating their projects' settings, engaging with their firms, and launching into their marketplaces. By examining each level, marketing expertise influences how marketing specialists conceive their marketing projects, market-orient their firm, and optimise their projects' settings. Next, organisation familiarity resources the marketing specialists' influence over their projects' consistency with the firm's branding and their connections and interactions with stakeholders and personnel. Overall, organisation familiarity means that the marketing specialists, particularly the marketing managers, will influence their project toward being authentic and aspirational to their firms' objectives, resources, and branding.

Table 6.5: Summary: Marketing specialist knowledge, practices and praxes at their level of influence

Knowledge domains	Practices /level of influence	Praxes	Description
Marketing expertise	Conceptualising /marketing specialist	Cultivating their projects' settings	> Marketing specialists were combining their skills and experience and managing project-related tasks with the aim of developing a viable creative proposition.
	Consolidating /firm	Engaging their firm	> Marketing specialists' ability to connect with their firm's non-marketers and resources to involve them in the project.
	Championing /market	Launching into their marketplace	> Marketing specialists were judiciously applying a variety of marketing tactics to optimise their project's influence on the market.
Organisation familiarity	Anchoring /marketing specialist	Authenticating their project's settings	> Marketing manager governed or regulated their marketing consultants' creative ideas or proposals toward consistency with their firm's branding, resources, and objectives.
	Ingraining /firm	Knowing their firm	> Marketing managers' productivity from understanding, meeting, relating, committing, and being accountable to the firm's personnel, stakeholders, and objectives.
Market intelligence	Calibrating /marketing specialist	Mirroring their project's settings	> Marketing specialists discussed their professional perspectives, instinct, and research on the target audience to make the project more appealing.
	Prognosticating /market	Gauging their marketplace	> Marketing specialists probed or anticipated their marketplaces' responses to proposed marketing offerings or changes to its settings.
Leadership	Facilitating /firm	Enabling their firm	> Marketing specialists empowered personnel and stakeholders by seeking their cogent viewpoints and using them as benchmarks or reference points.
	Arbitrating /firm	Orienting their firm	> Marketing specialists justified their decisions to detractors within the firm regarding their marketing project's settings.
Life experiences	Finessing /marketing specialist	Honing their project's settings	> Marketing specialists were espousing their personal views to tweak various emotional aspects of their project's settings to increase the receptivity of their audience.
	Fraternising /firm	Building rapport with their firm	> Marketing specialists engaging respectfully and personably with others, which in turn gained the recipients' confidence and trust.
	Resonating /market	Emoting their marketplace	> Marketing specialists were imbuing their project with pertinent emotive cues and messaging designed to instigate predictable responses.

Market intelligence is shown to provide the marketing specialists influence over their projects' market appeal, as well as probe and anticipate how the market will respond. Here, the knowledge domain is an essential influence in developing and launching a consumer-centric and competitor-savvy marketing project. Next, the leadership knowledge domain illustrates how marketing specialists influenced their firm by enabling the voice of the firm toward their project, as well as re-orient the voices that challenged their project. Overall their leadership capability serves to unify their firm's focus toward implementing their projects' settings and reaching their project's objectives. Finally, life experiences helped influence how marketing specialists nuanced their projects' settings, built relationships and confidence between the firm, stakeholders, and personnel, and motivated responses from their market. Moreover, the marketing specialists' life experiences humanised the project, making its presence and messaging engaging, and helping the marketing project processes to be enjoyed among the personnel and stakeholders involved.

Overall, the findings answer RQ2 by detailing how and why the marketing specialists' praxes were influential at the marketing specialist, firm, and market levels. Furthermore, the findings also provide evidence and examples of how vital the influence of marketing specialists were in regards to each of their firm's performance and market orientation (Göetz et al., 2009; Homburg et al., 2014; Verhoef & Leeflang, 2009; Verhoef et al., 2011; Wirtz et al., 2013). For instance, the findings demonstrate a direct relationship between the influence of the marketing specialist, rather than the marketing department (Verhoef et al., 2011), and the firm's performance and market orientation. Also, similar to Merlo and Auh's (2010) study of marketing departments in Australian firms, the New Zealand marketing specialists investigated also had a high level of influence within their firms. However, this investigation examined marketing specialists within four New Zealand cases rather than marketing departments in multiple multi-national firms (e.g., Verhoef et al., 2011). Chapter 7 concludes this investigation by discussing the contributions to knowledge made by this research, its limitations, and suggestions for further study.

Chapter 7 Conclusion

7.0 Introduction

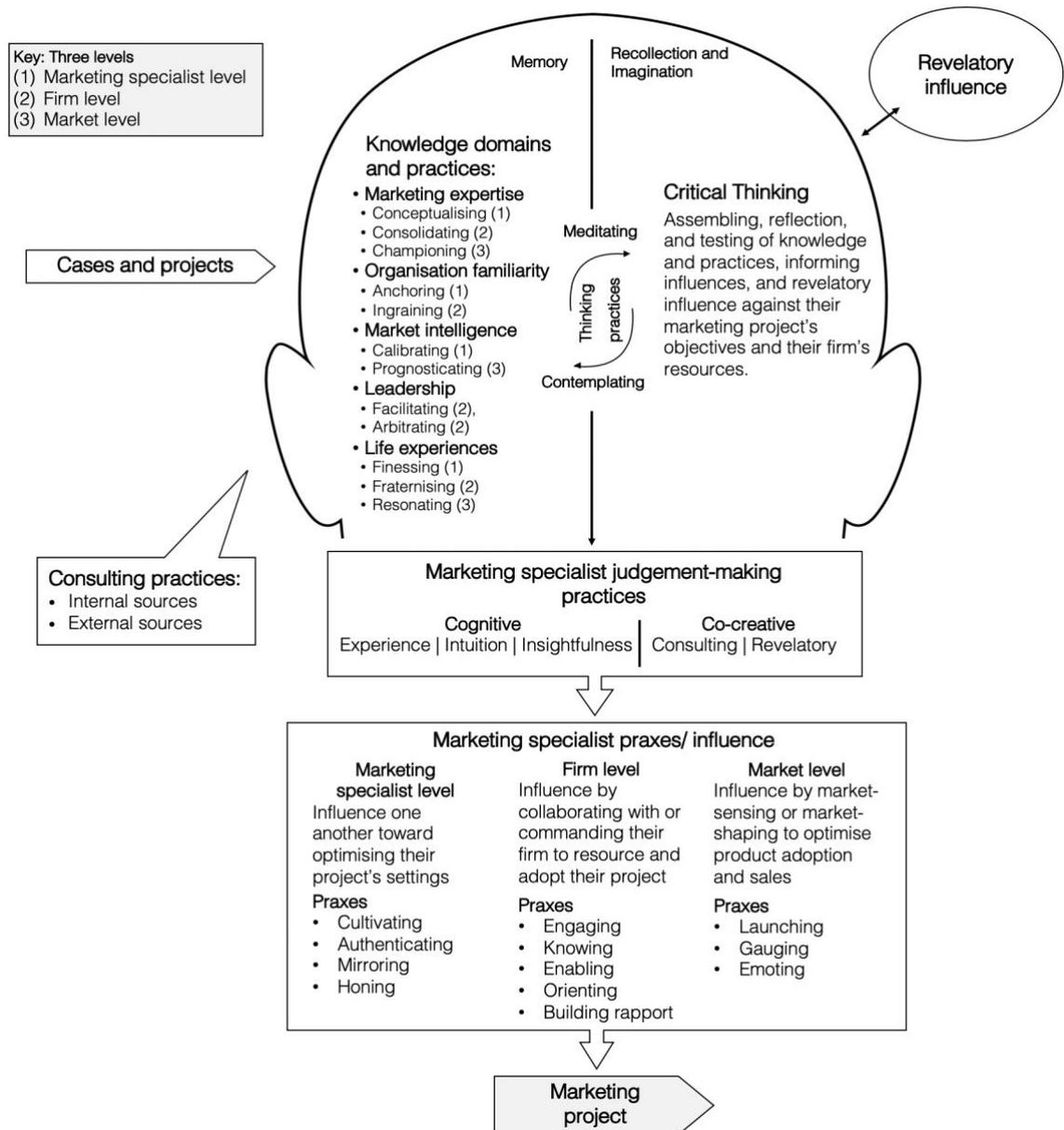
The issues which initiated this study were discussions and concerns within the literature regarding the declining influence of marketing departments (e.g., Day, 1992; Homburg et al., 2014; Verhoef & Leeflang, 2009). Until now, literature into a marketing department's influence typically examined their decision-making responsibilities (e.g., Homburg et al., 2014; Verhoef et al., 2011), their cultural context (e.g., Engelen & Brettel, 2011), their power (Merlo, 2011) and their marketplace's dynamics (e.g., Göetz et al., 2013; Wu, 2004). Despite these studies, recent literature strongly recommended a further inquiry into the marketing department's influence (Feng et al., 2015; Homburg et al., 2014; Leeflang et al., 2014). For instance, one of the Marketing Science Institute's (2018, p. 15) 2018-2020 research priorities, "How can marketing enhance its voice in the C-suite", seeks to understand an aspect of marketing's influence upon firms. Also, requests for in-depth research investigating various work-life aspects within the marketing role have been made (e.g., Dibb et al., 2014; Jaworski, 2011). Although questions remain regarding the extent to which the marketing department influence is declining, if at all, a gap in the literature exists regarding marketing specialist knowledge and its influence. Therefore, this study examined marketing specialist knowledge and its influence by identifying the practices of marketing specialists during marketing projects, and examining how and why their subsequent praxes were influential.

This study's research questions relate to marketing specialist knowledge and how and why it is influential. Specifically, RQ1 asked what practices marketing specialists draw on to plan, develop, implement, and appraise a marketing project? RQ2 asked how and why their praxes are influential at the marketing specialist, firm, and market levels? This final chapter discusses how the research questions were answered, how the objectives were achieved, and posits several implications of this research. First, a synopsis of the findings, including a conceptual model, summarises the main themes and processes between marketing specialist knowledge and their influence. Next, findings from the within-case analyses are examined. The marketing specialists' shared practices and praxes are discussed next, as well as how these findings add to the current literature. Following on, the theoretical, methodological, empirical, and managerial contributions of this research are considered. Finally, the limitations of this study are acknowledged, and suggestions for further research and final comments on the research are offered.

7.1 Findings

The conceptual model in Figure 7.1 presents a summative link between the knowledge domains, practices, revelatory phenomena, praxes, and influence the marketing specialists experienced during their marketing projects. Although the marketing specialists from each firm undertook a variety of procedures when producing their various projects, the practice-based lens outlines the themes and processes they shared.

Figure 7.1: Marketing specialist knowledge and its influence in marketing projects



First, the Cases and projects box-arrow signifies two meanings. First, it signifies the previous projects that have contributed to the marketing specialists' knowledge from each case. Second, it represents the current marketing projects' brief and how responsibility for the project was delegated to each marketing manager. With this responsibility, the marketing specialists, both

within the marketing teams and the external consultants, began to think about the project and its settings. As this research is concerned with the knowledge of marketing specialists, the large circle represents the marketing specialists' mind. As derived from the literature review and subsequent data analysis, five knowledge domains reside within their memory, ready to be applied to the project, or task, at hand. Hence, the left-hand side of the circle contains the marketing specialists' knowledge domains and their constituent practices. As shown, the practices within each knowledge domain are numbered, pinpointing each level at which a practice was identified, whether the (1) marketing specialist, (2) firm, or (3) market level. The practices residing within each knowledge domain represent, as Schatzki, Knorr-Cetina, and von Savigny (2001, p. 11) put it, "embodied, materially mediated arrays of human activity centrally organized around shared practical understanding". These findings, therefore, partially fulfil one of the main objectives of this research: to identify marketing specialists' practices as they planned, developed, implemented, and appraised a marketing project.

Next, the Consulting practices rectangle in Figure 7.1 represents the interactions marketing specialists had with non-marketers regarding the marketing project, whether they were internal or external to the firm. Practices of consulting internal and external sources describe how marketing specialists elicited subject-matter expertise and resources relating to the project from a variety of stakeholders.

The oval on the top right-hand side next to the marketing specialists' mind labelled Revelatory influence was also an informing influence. However, this phenomena, sometimes described as 'light bulb' moments, occurred independently of marketing specialists' knowledge domains and consultative practices. Instead, revelatory ideas were intervening factors whose occurrences, while hoped for by the marketing specialists, could not be predicted. Apart from one instance in the data, the marketing specialists maintained that this phenomenon typically occurred later in their project, and usually when they were not thinking about their work.

Next, on the right-hand side within the circle, the marketing specialists employed their imaginations' capabilities to assemble, reflect, and deliberate upon their projects' settings. Here, the marketing specialists subjected their amassed knowledge and any revelatory ideas to a critical thinking processes. The critical thinking process is illustrated by the curved arrows which portray the marketing specialists' reasoning iteratively with data, information, knowledge, and wisdom from various sources and any revelatory ideas. As shown, the marketing specialists used two sub-procedures in their thinking practices, namely meditating and contemplating. The top arrow, Meditating, represents how the marketing specialists reimagined their current knowledge toward forming a new idea, concept, or solution. Once formed, or alternatively a revelatory idea occurred, the marketing specialists began contemplating the solution or idea, represented by the bottom arrow, carefully considering or testing its viability. Also shown with the bottom arrow, contemplating suggests the marketing

specialist tests a new concept, idea, or solution against new and current knowledge. In short, meditating was practiced to create or develop ideas, whereas contemplating sought to test the appropriacy or need for further development of their ideas.

As depicted, critical thinking engaged the marketing specialists' own knowledge domains and practices, the internal or external sources they consulted, and the revelatory influences they experienced. Here, the arrows pass from the knowledge domains and practices on the left over to the reflective and testing cognitive workspace on the right. Subsequently, concepts, solutions, or the development of their marketing projects' settings were reflected upon and tested on the right-hand side. This process mixes cognitive and creative states of mind which cultivate and test their own, their consultants', or their revelatory ideas to develop or determine their marketing projects' settings. If an outcome had potential, it passed from the reflective testing side on the right, over to the marketing specialists' knowledge domains on the left as a viable concept, solution, or setting. If viable, it was shared with internal personnel or external consultants for testing, developing, approval, and/ or adoption.

From here, the Marketing specialists' judgement-making practices became evident, where their two main forms, cognitive and co-creative judgement-making, were identified. Thus, Figure 7.1 illustrates how marketing specialists, using their own and others' knowledge domains and constituent practices, along with revelatory ideas, make decisions regarding their marketing projects. Finally, Figure 7.1 outlines the influence and praxes in which marketing specialists were influential at each level, whether among other marketing specialists, their firm, or their market. Hence, based on the three levels in which they were influential, Figure 7.1 encapsulates the findings regarding the marketing specialists' knowledge domains, their constituent practices, and subsequent praxes and influence. Serving as an illustrative summation, Figure 7.1 outlines the findings and contributions of this research throughout this chapter.

7.1.1 Findings from the within-case analyses

The within-case analyses examined the knowledge domains determined from the literature and their relation to each stage of the marketing projects, namely the planning, developing, implementing, and appraisal stages. Here, the findings show how each knowledge domain was represented in each case, their link to the marketing specialists' influence, and which knowledge domain predominated at each stage of the project. Also, a picture emerged of how knowledge domains might distinguish marketing specialists from other marketing and non-marketing practitioners, as described below.

7.1.1.1 Knowledge domains

The within-case analyses identified instances of marketing specialists' knowledge and influence from the data and sorted them into the five knowledge domain categories derived from the literature. In doing so, instances of marketing specialist knowledge were categorised into either

marketing expertise, organisation familiarity, market intelligence, leadership, or life experience nodes. The results from the within-case analyses confirmed that the knowledge domains determined from the literature review satisfactorily categorised the various knowledge instances expressed or exhibited by the marketing specialists.

Marketing specialist knowledge had not been categorised as knowledge domains before.

According to Rossiter (2001), marketing knowledge is that which marketing managers draw upon in the course of their work, as well as what marketing academics teach. Although the literature did not provide an agreed upon definition of marketing knowledge, it did provide examples of marketing knowledge being expressed as marketing capabilities or competencies (e.g., Gray, Bell, et al., 2007; I. Walker et al., 2009) and procedural capabilities (e.g., Homburg et al., 2014; Moorman & Rust, 1999; Verhoef et al., 2011). Hence, this study has contributed to the literature by producing a new form of knowledge classification, i.e., knowledge domains.

Each knowledge domain, its definition and prevalence within the marketing projects provided further insight into how marketing specialist knowledge was influential throughout each case. For this research, the knowledge domain 'marketing expertise' was defined as knowledge regarding the development, implementation, and/ or control of marketing solutions, strategies, and policies. Marketing expertise was prevalent with marketing specialists across the cases and identified at almost every stage. Therefore, a distinct attribute of the marketing specialist was their marketing expertise and its extensive use and influence within their role. Second, 'organisation familiarity' was defined as knowledge of the firm's personnel, branding, structure, culture, stakeholders, resources, capabilities, strategic intent, identity, offerings, and commercial setting. The data suggests this domain was also prevalent, although more so with the marketing managers than the marketing consultants, across each stage of each case. Hence, organisation familiarity played a significant role in determining the settings of each project and comprising the influence of the marketing managers.

Third, 'market intelligence' was defined as formal and informal insights into current and anticipated market needs and movements, including competitor activities. Market intelligence was identified across each case at the appraisal stage only; whereas its utilisation infrequently occurred at other stages of each case. A critical condition of market intelligence, whether it was recently acquired or preceded the marketing project, was demonstrating its legitimacy before being used as a tool of influence. The legitimacy of market intelligence was often validated by using third-party primary or secondary research methods.

Fourth, an unmodified definition provided by Meuser and Nagel (2009) defines the 'leadership knowledge' domain as the process whereby an individual influences a group of individuals to achieve a common goal. In contrast to market intelligence, leadership was prevalent across the cases except at the project appraisal stage. In the cases examined, the marketing specialists' leadership assisted in aligning their firm to the purposes and objectives of their marketing

projects. Last, the knowledge domain of 'life experiences' comprised of the values, personal skills, training, and talents which help with ways of understanding how things and people are linked. Compared to other knowledge domains, life experiences occurred the least throughout the cases, although its use was more frequent in the developing and implementing stages of their projects. Typically, non-marketing skills from marketing specialists' previous roles, training, networking, and natural talents were used or were transferred, into the development and implementation of their projects. Their life experiences skills often manifested as personal touches either relationally among other stakeholders, or materially within their projects' settings.

These findings are useful because knowledge domains assist in classifying the different types of marketing specialist practices and influences at various levels, i.e., marketing specialist, firm, and market levels. Ergo, the practices, influence, and performances of the marketing specialists and their marketing projects could be traced directly back to their knowledge domains, as shown in Figure 7.1. Moreover, the five knowledge domains could be identified at the four stages, i.e., the planning, developing, implementing, and appraising stages, as they were utilised within a marketing project.

In sum, the findings confirmed the knowledge domain themes within which marketing knowledge data were categorised and confirmed, and from which the subsequent identities of the practices and praxes were decided. Hence, the first contribution of this research is to provide five broad knowledge domains, which establish a conceptual infrastructure to examine the marketing specialist practices and influence used throughout their marketing projects.

7.1.1.2 Influence of the marketing specialists and their projects

Results from the within-case analyses highlight how marketing specialists from each case were influential among other marketing specialists, their firm, and their market. As shown at the base of Figure 7.1, the findings regarding marketing specialist influence have been categorised into each of these three levels. First, at the marketing specialists level, the marketing specialists influenced each other with their subject-matter expertise and viewpoints in order to optimise their projects' concept and settings. Second, at the firm level, the marketing specialists were influential due to their collaborative and commanding approaches when dealing with personnel, whatever their hierarchical position in the firm. These collaborative and commanding approaches were used at the firm level to influence personnel and shareholders toward resourcing and adopting their marketing projects. Marketing specialists using commanding or collaborating approaches with others is not new; Merlo (2011) for instance, describes these attributes in bureaucratic, critical contingency, and network power terms.

Third, at the market level, the marketing specialists were influential on their market due to their market-sensing or market-shaping approaches (see Table 4.5b). The concepts of market-sensing

(Day, 1994) and market-shaping (Callon, 1998) are also well known in the literature. For this study, market-sensing describes how the marketing specialists influenced their market using their target market's preferences. For example, the Intercity Group and Zespri conducted surveys to determine their target market's tastes and preferences to optimise their product's sales potential. On the other hand, market-shaping describes how the marketing specialists' projects sought to influence the marketplace by forming new markets or changing nontrivial aspects of their market's characteristics (Nenonen, Storbacka, & Windahl, 2019). For instance, Trustpower's bundled utility product created a new proposition for the energy and telecommunications market, or TBOP's rebranding project sought to rejuvenate their target market's perspective of the region. In brief, the market-sensing and market-shaping approaches used by the marketing specialists served to influence their market into adopting and purchasing their firm's offerings.

The within-case analyses show marketing specialists influencing one another, using collaboration or commanding approaches with stakeholders, as well as the market-sensing and market-shaping approaches they used. Specifically, Case 3 demonstrated a high collaboration approach with other stakeholders with predominantly market-shaping attributes; this marketing specialist trait was termed the Diplomat. Case 4 demonstrated a high collaboration approach with a predominantly market-sensing approach, and the marketing specialist trait was subsequently termed the Champion. Case 1 demonstrated a marketing specialist, termed the Driver, with a high commanding approach whose project had market-shaping qualities. Last, Case 2 showed a marketing specialist, named the Communicator, with a commanding approach whose project had market-sensing attributes.

In sum, the findings from the within-case analyses provide several implications. First, marketing knowledge can now be discussed as knowledge domains, which may help marketing practitioners and managers ascertain how marketing savvy their non-marketing personnel, marketing personnel, and consultants might be. Next, some knowledge domains, such as market expertise and organisation familiarity featured extensively throughout almost every stage of each project, whether during the planning, developing, implementing, or appraisal stages. On the other hand, other knowledge domains appeared only intermittently at various stages, depending on each case. However, the value of each knowledge domain in relation to the marketing projects' concept, settings, and performance were not calculated. Therefore, until further studies can be carried out, the frequency or prominence of one knowledge domain should not determine its contribution.

Finally, the within-case analyses also classified how the marketing specialists were influential among themselves, their firm, and their market within each case. Here, the marketing specialists influenced each other in order to optimise their project's concept and settings. At the firm level, the marketing specialists were influential due to their collaborative and commanding approaches

when influencing personnel within their firm, while at the market level, they were influential due to their market-sensing or market-shaping approaches. Overall, the findings contribute cohesive work-life insights into marketing specialist knowledge and their influence during project work.

7.1.2 Findings from the cross-case analyses

Having confirmed the knowledge domains in the within-case analyses, the cross-case analyses examined their practices and praxes, and the influences shared by the marketing specialists across the cases. This analyses also identified the practices of marketing specialists at each level, whether among other marketing specialists, the firm, or the market level. The analyses also determined how their practices were used in their thinking and decision-making processes as well as the intervening phenomenon termed here as revelatory ideas.

The cross-case analyses also examined and identified the collective and shared praxes of the marketing specialists at each level. Their praxes, or what the marketing specialists carried out (Whittington, 2006), were identified for two reasons. First, the identity and definition of each praxis further illuminates and differentiates the practices they are imbued by. In other words, one may further understand the practices the marketing specialists had by the praxes or collective activities that followed. Second, and perhaps more importantly, the identity of each praxis of the marketing specialists at each level provides a link between their knowledge and their influence at each level. In brief, the marketing specialists' praxes identified during their marketing projects indicated the type and nature of their influence among marketing specialists, their firm, and market.

The practices of marketing specialists working throughout their marketing projects were grouped into four main themes: the knowledge domain practices, the consulting, the thinking, and the judgement-making practices. Of these four, the knowledge domain category contains 12 practices; each practice is distinguished by the knowledge domain they are drawn from, and the level they were used. These practices and the knowledge domain and level they were identified in are shown above in Figure 7.1. Furthermore, the other central practices identified, namely consulting, thinking, and judgement-making practices are also delineated.

To underpin the validity of each of these practices, this research also determined the procedures, understandings, and engagements that constitute each of the practices identified. Concerning the procedures, the findings describe the rules, principles, precepts, instructions or 'know-that' that marketing specialists have in each identified practice. Next, understandings or 'know-how' describe the marketing specialists' knowledge of what to say and do. Last, engagements link the ends, means, and moods that govern what makes sense for the marketing specialists to do. Therefore, by identifying the marketing specialists' procedures, understandings, and engagements, further detail of how the marketing specialists' practices are constituted emerge.

In brief, the findings provide a work-life perspective of how marketing specialists develop and apply their knowledge, make decisions, and how and why they were influential during their marketing projects.

7.1.2.1 Practices and praxes of marketing specialists at the marketing specialist level

At the marketing specialist level, where the marketing specialists interacted with one another, the practices of conceptualising, anchoring, calibrating, and finessing emerged. Overall, these findings indicated how the marketing specialists' practices were focused primarily on their marketing projects' concept and settings. Here, the marketing specialists conducted frequent meetings with each other to discuss, develop, research, and refine ideas, applying their diverse knowledge domains and constituent practices toward their projects. At the marketing specialist level, practices within their marketing expertise, organisational familiarity, market intelligence, and life experience knowledge domains came to the fore while levels of leadership practices were low. This finding indicates how the marketing specialists, which included both managers and consultants, listened to one another's point of view to identify optimal solutions. For example, one marketing manager's anchoring practices trumped a consultant's conceptualising practices, as the creative consultant's idea was not considered appropriate for their firm's branding. In another case, the wisdom of a third-party marketing consultant to hold workshops with the firm's personnel around the country caused the in-house marketing manager to comply. Hence, the various marketing specialists influenced one another with their subject-matter expertise in order to optimise the concepts and settings of the marketing projects they were working on.

Based on the practices among marketing specialists, the resulting praxes were found: cultivating, authenticating, mirroring, and honing their projects' settings. Here, during the analysis of each stage of the marketing project, these categories emerged from descriptions of marketing specialists expressing how they worked together and influenced each other. Overall, these praxes characterise the influence of the marketing specialists, i.e., marketing managers, various marketing, advertising, or branding consultants, on one another to develop their project's settings. The marketing specialists influenced one another using their area of expertise to overrule, "sense-check", and refine each other's perceptions, opinions, and ideas to optimise their projects' settings.

These findings may help explain some disparities regarding whether or not marketing departments are losing their overall influence in firms. Typically, previous studies have not factored in the firm's use and influence of third-party marketing consultants (e.g., Homburg et al., 2014; Leeflang et al., 2014; Moorman & Rust, 1999). Therefore, the marketing department's loss of influence within the firm due to firms outsourcing marketing roles to marketing consultants may not have been adequately factored or acknowledged in the literature.

7.1.2.2 Practices and praxes of marketing specialists at the firm level

At the firm level, the practices of consolidating, ingraining, facilitating, arbitrating, and fraternising were identified. These practices show how the marketing managers, in particular, used meetings, presentations, and workshops to garner the perspectives, resources, and consensus of relevant personnel to support their projects. At the firm level, practices within their marketing expertise, organisational familiarity, leadership, and life experience knowledge domains were used, while market intelligence practices were not. While this finding seems counter-intuitive, the evidence suggests that market intelligence merely supplemented the other practices used at this level. For example, the marketing manager from the InterCity group used market intelligence within the practice of arbitrating to convince a board member to agree to the firm's new dress code. Further, the marketing consultant engaged by the InterCity Group used the practice of consolidating to seek the frontline staff and internal stakeholders' perspectives regarding aspects of their target audience. In both examples, market intelligence, while present, merely augmented the primary practices of arbitrating and consolidating so the marketing specialist could gather their stakeholders' perspectives and build consensus.

Additionally, the study identified the practices' resulting praxes that were influential at the firm level, namely: consolidating, ingraining, facilitating, arbitrating, and fraternising at the firm level. These findings emerged by analysing the data describing the marketing specialists' influence on their firm's personnel, management, stakeholders, and board members during their projects. Overall, these praxes categorise the various activities the marketing specialists carried out to influence relevant personnel to adopt and provide their perspectives and various resources to their marketing projects. As shown in Figure 7.1, the marketing specialists were influential by collaborating and commanding their firm to resource and adopt their marketing project.

The generally collaborative nature of the influence of marketing specialists at the firm level, despite the confrontations mentioned earlier, suggests some interesting implications for research on market orientation. Previous studies have posited a dual approach between a firm's marketing department and their market orientation (Drucker, 1954; McKitterick, 1957; Moorman & Rust, 1999; Verhoef et al., 2011; Webster, 2009), which is supported by the findings of this research. Here, findings across the cases strongly suggest that the marketing manager's praxes, underpinned by their relevant knowledge domains and practices, influence what the literature identifies as the firm's market orientation. For instance, praxes depicted in Figure 7.1, such as engaging, enabling, and orienting their firm, show how the marketing specialists positively affected their firm's market orientation. The practice-based findings suggest that the marketing specialists both initiated and enabled their firm's market orientation during their marketing projects. In response, non-marketers within the firm who supported a customer-centric (market oriented) mindset, adopted and resourced the marketing project more readily. These findings relate somewhat to Moorman and Rust's (1999) study which suggested that one of the

marketing department's influential roles is connecting customers with various processes within the firm. Here, the marketing department's role is to connect customers to senior management and various functions within the firm in order to achieve customer acquisition and retention via customer satisfaction (Moorman & Rust, 1999). In sum, these findings assist our understanding of the nature of the relationship between the marketing department and market orientation by providing a work-life view of how they are linked.

7.1.2.3 Practices and praxes of marketing specialists at the market level

The practices of championing, prognosticating, and resonating were found at the market level. On the whole, these marketing specialist practices were focussed on their markets' response to their marketing project, specifically its concept and each of its settings. Here, the marketing specialists anticipated, probed, and appraised their target audiences' reactions and feedback to various project settings and adjusted them where possible for greater effect on market responses. Practices were found within the marketing expertise, market intelligence, and life experiences knowledge domains at the market level. In other words, practices within organisational familiarity and leadership were not relevant at the market level. Instead, the marketing specialists drew from practices within marketing expertise, market intelligence, and life experiences to promote their project, predict their markets' response, and to emote their market respectively. Here, the aim for their projects' settings were elements and messages designed to resonate with their target audience. Hence the market level practices found within the life experiences, market intelligence, and marketing expertise knowledge domains emerged. The practices of championing, prognosticating, and resonating focused on the markets' anticipated and actual responses, so that the marketing project, and any future iterations, might be optimised.

As well as the practices found at the market level, the following findings describe how the marketing specialists' praxes were influential, specifically by launching, gauging, and emoting their marketplace. These praxes became evident as participants, mainly the marketing and senior managers, set in motion their marketing projects upon their target audience, competitors, and stakeholders.

As shown in Figure 7.1, the marketing specialists influenced their market using market-sensing or market-shaping approaches to augment their product's adoption and sales. Concerning market-sensing, the marketing specialists ascertained their market's responses to their projects in order to optimise its settings prior and post-launch. When market-shaping, marketing specialists sought to influence their marketplace by introducing differentiated offerings, or transform their target market's perspective of their firm or its offerings. In brief, the marketing specialists adopted a market-sensing or market-shaping approach to influence their market into purchasing and retaining their firm's offerings.

The project settings across the cases were numerous, including design, service, and message elements; however each marketing specialist carefully regulated the emotive response their target audience was likely to have. Emoting the market was the first consideration the marketing specialists considered when influencing their market, followed by gauging their market, then launching their project and gauging again. In doing so, the marketing specialists were taking informed steps when adjusting their projects' settings toward its optimisation and maturation. Overall, the marketing specialists' influence on the marketplace was indirect, being mediated by their marketing project.

7.1.2.4 Practices of consulting

Many of the marketing specialist practices identified above, including conceptualising, anchoring, calibrating, and consolidating, led the marketing specialists into consulting with sources internal and external to their firm. In other words, to optimise their marketing projects' settings the marketing specialists met with non-marketing specialists to develop a deeper understanding of issues relevant to their marketing projects. Consulting practices provided the marketing specialists access to the perspectives, or knowledge domains, of stakeholders of differing backgrounds to form robust conclusions regarding their projects' settings.

By consulting with non-marketing sources, the marketing specialists' knowledge domains were increased as well as shared with others. As shown by the double-headed arrow in Figure 7.1, consulting with various sources meant they shared knowledge domains and the marketing specialists and consultants subsequently influenced one other. Key benefits of consulting with others included an increase in intelligence and allegiance between the marketing specialist and stakeholders and an increase in confidence in their projects' settings. In sum, consulting practices expanded particular practices within the marketing specialists' knowledge domains, reinforced the marketing projects' settings, and provided the firm further confidence in launching their projects.

7.1.2.5 Revelatory influences or ideas

Identified as an intervening factor rather than a practice, instances of revelatory influences also emerged during the research. Revelatory influences or ideas are described as a metaphysical phenomenon, distinct from one's insightfulness or intuition, which provided various marketing specialists either ideas, concepts, or solutions. Findings showed that sometimes the acquisition, development, and management of knowledge did not axiomatically materialise into a useful concept for a marketing project. In other words, the combined experience, skills, and applied research of marketing specialists failed to manifest into a viable marketing project concept or solution. Fortunately for some marketing specialists, an interesting and viable concept materialised in their mind, often at leisure times when they were not purposely thinking about their project. The ideas, concepts, or solutions provided by the revelatory influence were

sometimes comprehensive in fulfilling their project's brief, whose implementation provided a substantial return on investment. In other instances, the revelatory influence provided only the "seed" (C3:P5) of a concept, idea, or solution which they evolved or improved on with critical thinking practices.

Findings suggest that literature regarding critical thinking (Klebba & Hamilton, 2007), dual-process theories of rational thinking (e.g., Evans, 2011; Stanovich et al., 2011), and convergent or divergent ideation techniques (e.g., Kilgour & Koslow, 2009; Oppezzo & Schwartz, 2014), are somewhat distinct to revelatory ideas. For instance, the occurrence of revelatory ideas usually occurred while they were not thinking about work. Moreover, the evidence suggests that the revelatory influences were unlikely a deliberate internal cognitive process due to the surprise, delight, and critical thinking which immediately followed their occurrences. Hence, the occurrence of revelatory influence is distinct from critical and rational thinking, as well as ideation techniques, and is, therefore, a new finding.

7.1.2.6 Practices of thinking

The marketing specialists' practices of thinking describe how they ascertained their projects' settings by considering and envisaging their knowledge domains along with their firm's resources and objectives. As Figure 7.1 shows, sometimes a marketing specialist's existing knowledge was sufficient in developing a suitable marketing project solution or concept. During their thinking practices, their conclusions become part of the marketing specialists' knowledge domain and subsequently a cognitive judgement-making practice.

On the other hand, if the marketing specialists' thinking practices mingle with consulting practices, they result in a co-creative judgement-making decision. Judgement-making practices are discussed further in the next section. However, as shown in Figure 7.1, a revelatory influence may intervene, in which a viable idea materialises and tested against the marketing specialists' knowledge and practices. If appropriate, the revelatory idea is often shared with others and hence proceeds to become a co-creative judgement-making practice.

To reiterate, while creative thinking studies have described convergent and divergent thinking practices (e.g., Kilgour & Koslow, 2009; Oppezzo & Schwartz, 2014), research regarding or discussing revelatory phenomena appears to be lacking in the literature. Dual process theories suggest, concerning thinking, we have an unconscious, automatic system and a conscious, rule-based system (Evans, 2010). While evidence within the current research relating to marketing specialist thinking practices agrees with the current literature, its findings also add revelatory influence as an external source. Hence, the thinking practices of marketing specialists include conscious and unconscious thinking (Evans, 2011; Kahneman, 2011), critical thinking (Klebba & Hamilton, 2007), and convergent and divergent ideation processes (Kilgour & Koslow, 2009), as well as processing ideas from revelatory influences.

7.1.2.7 Practices of Judgement-making

To determine which settings their marketing projects should adopt, two kinds of marketing specialist judgement-making practices were found: cognitive and co-creative practices. Overall, these practices describe various ways in which decisions regarding the marketing projects were made. As depicted in Figure 7.1, cognitive decisions were based on the marketing specialists' experience, intuition, and insightfulness and describe how they made the decisions themselves. Co-creative decisions, on the other hand, were made with input from external agencies, whether by consulting internal or external sources, or the occurrence of revelatory influences. The findings related to the judgement-making practices describe how, after all the research, consultation, contemplating, and predictions have been made, the marketing specialists responsibly determined their projects' settings.

Along with findings relating to their knowledge domains, this finding further demonstrates the marketing specialists' central role in their marketing projects. The marketing specialists' conceptual competency of holding details of each of their projects' settings, the knowledge of its purpose and objectives, and their firms' resources also emerged. Accordingly, the marketing specialists were uniquely and comprehensively acquainted with their projects and how any changes may play out, qualifying them to make the final judgement on each setting. Therefore, whether decisions were made alone or by collaborating, the marketing specialist, particularly the marketing managers' central role in the marketing project process distinguished them in their judgement-making practices.

7.1.3 Summary of significant new findings

A key finding from this research discusses the relationship, from a practice theory lens, between knowledge and influence. In this study, the concept of knowledge is revised into knowledge domains, which are constituted by practices and expressed outwardly as praxes. From this lens, it is the praxes, or how the marketing specialists carried out their practices, that subsequently influenced the marketing specialist, firm, and market levels. These findings address a gap in the literature linking marketing specialist knowledge and influence, and provides some answers to calls for research into the work-life aspects within the marketing role (e.g., Dibb et al., 2014; Jaworski, 2011).

Also, by connecting knowledge, practices, revelatory influences, praxes and influence together, the conceptual model presented in Figure 7.1 constitutes a new finding. Although it represents marketing specialists, the model itself could be a template with which others might determine the knowledge domains, practices, and praxes of other practitioners.

Also, while findings of marketing specialists drawing from their own and other's experience, intuition, and insightfulness were expected, the nature and prevalence of revelatory ideas were new. While the literature discusses dual purpose thinking (Evans, 2011; Heijltjes et al., 2014;

Kahneman, 2011; Stanovich et al., 2011), critical thinking (Klebba & Hamilton, 2007), and creative ideation (e.g., Kilgour & Koslow, 2009); revelatory influences or ideas have not previously been identified in the literature. However, this research provides insights linking the marketing specialists' knowledge, thinking, consulting, revelatory ideas, judgement-making, and subsequent influence among other marketing specialists, their firm, and their market.

From a practice theory perspective, this research provides specific findings relating to the influence of marketing specialists at each of the three levels. First, at the marketing specialist level, several praxes emerged, namely cultivating, authenticating, mirroring, and honing their project's settings. Overall, the primary influence of the praxes or activities the marketing specialists carried out at the marketing specialist level was to optimise their marketing projects' settings. Second, marketing specialists' praxes at the firm level, namely engaging, knowing, enabling, orienting, and building rapport were influential in collaborating or commanding their firm throughout the project. Third, the general influence of the marketing specialists praxes at the market level, namely launching, gauging, and emoting the market, could be summarised as market-sensing or market-shaping. By market-sensing or market-shaping, the marketing specialists influenced their market into adopting or purchasing their firms' offerings. Overall, findings in practice-terms provided a useful understanding of the collective and shared sayings and doings of both the mundane and creative work and influence of marketing specialists. By understanding common themes of practices shared by marketing specialists, the study illustrates the micro (marketing specialist), mezzo (firm), and macro (market) level interactions they engaged in (cf. Jarzabkowski & Spee, 2009). In sum, this section presented the various concepts, routines, dialogues, and tools shared by the marketing specialists throughout each level and each stage of their marketing projects. In conclusion, this section answers RQ1 and RQ2 by identifying and discussing the influence of marketing specialist knowledge using practice theory.

7.2 Theoretical contributions

This research has produced eight major contributions to the literature.

1. The marketing specialists' five knowledge domains
 - Marketing expertise
 - Organisation familiarity
 - Market intelligence
 - Leadership
 - Life experience
2. The practices and praxes of marketing specialists
 - At the market specialist level:
 - Conceptualising using marketing expertise
 - > Cultivating their projects' settings
 - Anchoring using organisation familiarity

- > Authenticating their projects' settings
 - Calibrating using market intelligence
 - > Mirroring their projects' settings
 - Finessing using life experiences
 - > Honing their projects' settings
 - At the firm level:
 - Consolidating using marketing expertise
 - > Engaging their firm
 - Ingraining using organisation familiarity
 - > Knowing their firm
 - Facilitating using leadership
 - > Enabling their firm
 - Arbitrating using leadership
 - > Orienting their firm
 - Fraternising using life experiences
 - > Building rapport with their firm
 - At the market level:
 - Championing using marketing expertise
 - > Launching into their marketplace
 - Prognosticating using market intelligence
 - > Gauging their marketplace
 - Resonating using life experiences
 - > Emoting their marketplace
3. The practices of consulting
 4. Revelatory influences and ideas
 5. The practices of thinking
 6. The practices of judgement-making
 7. The influence of marketing specialists at the aforementioned three levels.
 8. The conceptual framework, i.e., Figure 7.1, which link the these concepts together.

7.2.1 Marketing specialists' five knowledge domains

Determining the five knowledge domains from the literature is a contribution to the literature. The knowledge domains, namely marketing expertise, organisation familiarity, market intelligence, leadership, and life experiences provide a much broader conceptualisation of marketing knowledge than previous studies. For example, Rossiter (2001) cited four forms of marketing knowledge, namely marketing concepts, structural frameworks, strategic principles, and research principles. However, research suggested that these forms of academic marketing knowledge received limited use in the everyday work-life of marketing specialists (Ottesen & Kjell, 2004). Also, Rossiter's academic forms of marketing knowledge received criticism due to their emphasis on the transactional, at the expense of the relational, marketing paradigm (Brodie, 2002). Hence, Rossiter's work addressed a narrower range of marketing knowledge. However, this study's findings of the five knowledge domains appear to provide sufficiently characterised themes which the various knowledge marketing specialists applied during their projects.

7.2.2 Practices and praxes of marketing specialists

Moreover, this research contributes by classifying each knowledge domains' subset of practices and praxes, which were identified at the marketing specialist, firm, or market level by using practice theory. Each of the practices identified was further defined by its constituent procedures, understandings, and engagements. Furthermore, their subsequent praxes were also identified at each of the three levels, providing insights into how the marketing specialists used their various knowledge domains to influence others. Findings relating to the practices and praxes of marketing specialists is new and important as they provide themes regarding the understandings and activities the marketing specialists shared across the cases (Reckwitz, 2002). In doing so, this study answered calls to provide an in-depth inquiry into what marketing practitioners do (Ardley & Quinn, 2014; Jaworski, 2011) and how they contribute in various ways to their firm's performance (O'Sullivan & Abela, 2007).

7.2.3 Practices of consulting

Previous literature regarding the influence of marketing departments describe the prevalence of market orientation and the importance of connecting with others within the firm (e.g., Moorman & Rust, 1999; Verhoef et al., 2011). These studies however, provide few details on how and why market orientation and connecting with others is carried out. The practices of consulting provides the literature further understanding of how marketing specialists orient both internal and external stakeholders. As shown, the marketing specialists' knowledge of their firm's branding, resources, policies, objectives, industry, and the market was crucial in influencing both internal and external consultants. However, the subject-matter expertise, sense-checking, market research findings, approaches to project management, and design options the marketing specialists were provided by consultants were also crucial. Typically constrained to a firm-wide phenomena (e.g., Göetz et al., 2013; Verhoef et al., 2011), this study contributed insights into how the market orientation of both internal personnel and external stakeholders is carried out from a marketing specialists' perspective.

7.2.4 Revelatory influences

Findings of marketing specialists attributing crucial aspects of their marketing projects, such as its concept, settings, or solutions, to a revelatory influence is an important contribution. This finding provided further insight into how marketing specialists use their knowledge to contemplate revelatory ideas during their marketing projects, and how influential these ideas were. While conscious and unconscious thinking (e.g., Evans, 2011), critical thinking (Klebba & Hamilton, 2007), and convergent and divergent ideation processes (Kilgour & Koslow, 2009), have been addressed in the literature, the addition of revelatory influences appears to be new. Furthermore, the attributes of these revelatory ideas, including their timing, triggering,

truth and certainty, transcendent nature, and whether they comprehensively or partially fulfil a project's brief are also contributions.

7.2.5 Practices of thinking

Although various types of thinking, including critical, fast and slow, and creative thinking are addressed in the literature (Kahneman, 2011; Kilgour & Koslow, 2009; Klebba & Hamilton, 2007), conceptualising marketing specialist thinking as a practice is new. Across the cases, the findings show how the marketing specialists' thinking shared similar characteristics as they processed the various components of their projects. Whether the components they were thinking about derived from their own knowledge domains, from consulting others, or from revelatory ideas, the findings describe how they meditated or contemplated them. This contribution is important as it provides further insight into what marketing specialists do during their projects (Dibb et al., 2014).

7.2.6 Practices of judgement-making

Along similar lines, findings regarding the practices of judgement-making also provide further insight into what marketing specialists do during their projects. Findings relating to how they use their experience, intuition, and insightfulness, as well as their consulting practices and revelatory ideas, provide a new understanding on how marketing specialists make decisions. Previous research into marketing departments have found that being innovative is crucial to their influence (e.g., Verhoef et al., 2011). However this study considered how marketing specialists determined whether or not an innovative idea was appropriate for the firm. Therefore, findings related to the practices of the marketing specialist judgement is an important contribution to the literature.

7.2.7 Influence of marketing specialists

While previous studies have found that the marketing department has a significant and direct influence on firm performance (e.g., Merlo et al., 2012; Moorman & Rust, 1999; O'Sullivan & Abela, 2007), this research aimed to understand how and why they were influential. Furthermore, this research also aimed to understand marketing specialist influence among one another, within their firm, and upon their market. First, the findings showed how marketing specialists influence one another with their subject-matter expertise in order to optimise their project's settings. Second, the findings show how marketing specialists influenced their firms with collaborating and commanding approaches to gain their consensus and resources for their projects. And third, the marketing specialists influenced their market by adopting either a market-sensing or market-shaping approach to optimise their products' adoption by their target audience. These findings relating to how and why marketing specialists influenced each other, their firm, and their market are important contributions.

7.2.8 Conceptual framework

Although the five knowledge domains provide broad categorisations of knowledge for marketing specialists, the literature also called for individualised, problematised accounts of marketing work (Skalen et al., 2007). Criticisms of some research are that their findings are typically generalised representations of marketing work which have failed to adequately describe what marketing practitioners do (Ardley & Quinn, 2014; Dibb et al., 2014; Skålén & Hackley, 2011). For example, research had identified areas where marketing departments wielded strategic decision-making or power-based influences (e.g., Homburg et al., 2014; Merlo, 2011; Verhoef et al., 2011), or the marketing department's cogent skills, capabilities, and competencies (Gray, Ottesen, et al., 2007; I. Walker et al., 2009). These studies found that determinants such as accountability and innovativeness (Verhoef & Leeflang, 2009), bureaucratic, contingency, and network power (Merlo, 2011), and strategic thinking, leadership, management, skills were crucial in marketing.

This practice-based study, however, looked beneath these categorisations to examine the marketing specialists' knowledge, sources, decision-making means and processes along with the subsequent influence they had. Here, the findings describe the knowledge domains, practices, praxes, and revelatory ideas the marketing specialists had and their influence among marketing specialists, the firm, and the market. Overall, the findings describe in practice theory terms how and why the marketing specialists were influential when establishing their projects' settings, garnering consensus for their projects, and optimising their project's effectiveness. Figure 7.1 is a conceptual model that links all these concepts together.

In sum, the practice-based findings, summarised in Figure 7.1, addresses a gap in the literature concerning the perspectives of the everyday work, social interaction, and influence of marketing practitioners (Dibb et al., 2014; Jaworski, 2011). In sum, by approaching the topic of marketing specialist knowledge and its influence from a practice perspective, more is now known about their everyday work life, particularly during projects. Here, Figure 7.1. provides an illustrative summary of their knowledge and its influence among other marketing specialists, their firm, and their market. Hence, while previous studies list activities that contribute to the marketing department's influence, this research has provided nuanced accounts of how the marketing specialists' influences were constituted and effectual (Ardley & Quinn, 2014; Skålén & Hackley, 2011; Svensson, 2007).

7.2.9 Primary theoretical implications

Literature on marketing influence has hitherto focussed predominantly on the degree and manner marketing departments have influenced their firms. As discussed, concerns about the diminishing levels of marketing department influence within firms has sparked numerous studies which either allay (e.g. Merlo, 2011) or add (e.g. Homburg et al., 2014) to the level of

concern some academics have for the marketing department. For example, Merlo's (2011) representation of influence, namely power, was investigated in terms of bureaucratic, critical contingencies, network, and psychological power. Apart from psychological power, Merlo's (2011) found these forms of the marketing department's influence positively affected their firm. Moreover, Merlo (2011) found that the marketing department's influence was not declining. In contrast, Homburg et al. (2014) longitudinal and institutional lens on marketing departments' influence found it had waned over time. Their study found that several traditional marketing roles had been devolved to other departments, hence marketing departments were losing their influence due to firms adopting a market orientation. A criticism of these studies is they present determinants of the marketing department's influence as universal axioms, described by some as devoid of human life and social practice (e.g., Svensson, 2007). The gap in the literature regarding the marketing department's influence was understanding the active sense-making and social interactions that marketing practitioners carry out in the course of their work (Ardley & Quinn, 2014).

Therefore, rather than using power, institutional or other overarching approaches, this study examined marketing specialist knowledge and its influence at three levels using Practice Theory. As well as how and why marketing specialist knowledge influenced the firm, the current study also examined how it influenced other marketing specialists and the market in the context of a marketing project. The theoretical implication is that Practice Theory uncovers multiple nuances which explain how and why marketing specialists, and by extension, marketing departments are influential. For example, previous research demonstrates a link between the marketing department's influence on the firm through its accountability and innovativeness (Verhoef & Leeflang, 2009), or, as mentioned, their use of various forms of power (Merlo, 2011). However this study links marketing specialist knowledge and its influence among themselves, their firm, and their market, providing an in-depth account of the marketing's contribution to firms. Thus the current study answered calls to investigate the active sense-making and social interactions that marketing practitioners engage in daily as they influence others (Ardley & Quinn, 2014). Further, this study fills a gap in the literature, which has only indirect references to marketing specialist knowledge and its link to the marketing's influence. However, findings from this study agree with extant literature which asserts that the influence of marketing specialists, and therefore the marketing department, positively affect the firm's performance (cf. Homburg et al., 2014; Merlo & Auh, 2010).

Further understanding of marketing specialists influence and the nature of their influence emerged from this research. The literature provides some insight into factors that affect the marketing manager's influence, including resistance to change from personnel (e.g. Bonoma & Crittenden, 1988; Piercy & Morgan, 1994). However, this study uses practice theory to provide detailed accounts of how and why marketing specialist knowledge influenced other marketing

specialists, their firm and their market. The practices they carried, and how each of those practices were constituted, via each practice's procedures, understandings, and engagements, are detailed. Thus, these findings provide the literature with a rich account that links how and why each knowledge domain contributed to the marketing specialists' influence at various levels.

The findings also contribute to theories regarding the approach and merits of market orientation. Existing literature has, at times, couched marketing orientation as overtaking the marketing functional approach, causing concern around the declining influence of the marketing department (Day, 2011; Doyle, 1995; Ellis, 2006; Wirtz et al., 2013). For instance, some studies show that traditional marketing roles such as pricing, advertising, budgeting, distribution, and new product decisions are being overtaken by personnel in non-marketing roles (Hagberg & Kjellberg, 2010; Webster et al., 2004). However, data from the case studies show that marketing specialists, rather than relinquishing these roles, are sharing them with personnel in other functions in the firm. The non-marketing personnel involved in the marketing decision processes were often involved due to their customer, product, or marketplace experience. In doing so the marketing specialists increased their knowledge, optimised their projects' settings and adoption by their firm, which led to an increase in its performance in the marketplace. Hence, this study agrees with existing research that suggests that marketing department and a market orientation positively affect one others' and their firms' performance (Moorman & Rust, 1999; Verhoef et al., 2011; Wirtz et al., 2013).

Further, the subtle and collaborative influences marketing specialists demonstrated may alleviate other concerns about the marketing department's declining influence (cf. Engelen, 2011). The interviews revealed how nuanced the marketing specialists' influence was, particularly when they were recruiting the personnel and resources needed to optimise their projects' settings, adoption, and effectiveness. The consensus developed among non-marketing staff and stakeholders toward adopting the marketing projects elicited a market oriented approach within the firm, which undergirds the study of Verhoef et al., (2011). Hence, neither marketing department nor specialist influence should be measured by their general characteristics only; their influence also activates complex and inconspicuous changes throughout the fabric of a firm.

Findings strongly suggests that marketing specialists, at appropriate times, exert influence directly or indirectly via commanding or collaborative means among themselves, and upon their firm and market. Merlo's (2012) study on marketing department influence reminds the reader that influence is exercised power (Emerson, 1962). Along these lines, the marketing specialists' direct influence was exercised where they had expertise, had evidence, or when facing opposing forces to the adoption or optimisation of their projects' settings. However, their indirect influence can also be seen when they were collecting market data or gathering expert

perspectives. During these activities, the marketing specialists were unobtrusively encouraging firm-wide consensus toward developing and adopting the projects' settings. Not accounting for these nuances in marketing specialist influence, along with the timing of their marketing projects, would likely cloud findings regarding the marketing department's influence as a whole. For example, it may not be expedient for marketing specialists to be seated around the top-table without a major marketing project (cf. Nath & Mahajan, 2011). Whereas, at critical times within each of the case studies' marketing projects, the marketing specialists' views strongly influenced their general managers and board members. These findings may help resolve Marketing Science Institute's (2018, p. 15) 2018-2020 research priorities, "How can marketing enhance its voice in the C-suite?", by exhibiting their high level of influence during marketing projects. However, the study did not provide findings on how influential the marketing specialists were in the absence of a major marketing project.

7.2.10 Emergent theory

Rather than applying institutional (Homburg et al., 1999), contingency (Göetz et al., 2009; Wu, 2004), power (Merlo, 2011), and departmental lenses (e.g., Moorman & Rust, 1999; Verhoef & Leeflang, 2009) to examine marketing department influence, the current study uses Practice Theory to investigate marketing specialist knowledge and its influence. Furthermore, while the literature describes ways marketing departments are influential at one level, i.e. the firm, this study considers how marketing specialists influence each other, their firm, and their market. As discussed, Figure 7.1 summarises the findings of marketing specialist knowledge and its influence at the three levels mentioned. Hence, Figure 7.1 illustrates the marketing specialists' shared knowledge domains and constituent practices at the three levels examined, and the consulting, thinking and judgement-making practices used in their project work. Moreover, Figure 7.1 also introduces and illustrates how revelatory influences shaped their marketing projects' settings. In doing so, Figure 7.1 helps portray the knowledge and thinking processes marketing specialists undertake and the influence they use during a marketing project. In terms of emergent theory, these findings add to the extant generalised descriptions of marketing department influences within firms.

Furthermore, the findings demonstrate a strong link between the marketing specialists' knowledge domains and their influence at each level, providing insights into the nature of marketing specialist influence. As shown in Figure 7.1, at the first level marketing specialists used their knowledge to influence one another to optimise their projects' settings. Next, having determined their projects' settings, the marketing specialists used their knowledge to influence their firm into adopting and resourcing the project. During the development and launch of their project, the third level, the marketing specialists used their knowledge to influence, or specifically optimise, their markets' response to their project. Thus, the link between the marketing specialist knowledge and influence, in other words the 'how' and 'why' marketing

specialist knowledge is influential, has been further understood and illustrated. When planning, developing, implementing and appraising their projects, marketing specialists knowledge and its influence established itself from one level to another, from marketing specialist, to firm, and the market. Conversely, data or input from non-marketers at these levels informed the marketing specialists' knowledge and subsequently increased their influence through stakeholder engagement and consensus making. Therefore, the nature of marketing specialists knowledge and its influence appears scaffolded and iterative, gaining momentum from the input and consensus of stakeholders at each level. Thus, the findings describe the underlying mechanisms guiding the mutually dependent relationship between the marketing department and the firms' market orientation, discussed only in general terms in the extant literature (i.e. Göetz et al., 2009, 2013; Moorman & Rust, 1999; Verhoef et al., 2011; Wirtz et al., 2013).

Regarding the extant literature on thinking, the findings extend current concepts of cognition (e.g. Evans, 2011), particularly the notion of fast and slow thinking (Kahneman, 2011). While this research's findings include fast and slow thinking, it places cognition and its machinations into the work-life of a marketing specialists within a marketing project context. As shown in Figure 7.1, experience and intuition, which are forms of fast thinking, and insightfulness, or slow thinking, describe the cognitive attributes of marketing specialists. Furthermore, critical thinking, which includes meditating and contemplating, and co-creative thinking are portrayed in Figure 7.1 either independently or in the context of the revelatory idea phenomena. As discussed in the case studies, creative or innovative ideas that came in a revelatory fashion usually occurred when the marketing specialists were not thinking about their projects. Hence, the research's emergent theory is that fast and slow thinking make up only part of the creative cognitive processes marketing specialists undertake within their projects. Further, fast and slow thinking are used in response to revelatory ideas, but do not generate them. In sum, the findings extend current concepts of cognition to include revelatory influences.

7.3 Methodological contributions

In an area typically researched using quantitative methods (Ardley & Quinn, 2014), this research applied a case study methodology, using semi-structured interviews, focus groups, reflective journals and artefact collection methods. Hence, rather than collecting participants' assessments and intentions via surveys, real-life narratives were retrieved on the topic (Woodside, 2010). Additionally, previous practice-based research has predominantly examined the practices of marketing practitioners or advertising agencies within a single firm (e.g., Grahle & Hibbert, 2016; Harris & Ogbonna, 2003; Järventie-Thesleff et al., 2011; Svensson, 2007; von Koskull & Fougère, 2011), although occasionally multiple firms (e.g., Jaakkola, 2011). Whereas in the current study, four heterogenous firms were selected with marketing managers, board members, senior managers, colleagues, other personnel, stakeholders, shareholders, and

consultants participating in the research. This methodological approach provided an additional contribution, providing depth, richness, and triangulation of data needed to produce trustworthy and interesting findings (Creswell, 2012; Woodside, 2010; Yin, 2009). Here, the personal perspectives of marketing specialists regarding their marketing projects; the thinking, collaborating, contentions, decision-making, their actions and assessments were captured by audio recordings or their reflective journals. Use of semi-structured interviews also meant the marketing specialists' perspectives were compared with the board members', senior managers', personnel, stakeholders', and shareholders' perspectives to provide robust evidence. Hence, using multiple case studies, particularly the explanatory approach used in this research, assisted in answering this research's questions by focusing on contemporary phenomena in a real-life context (Yin, 2009).

However, case studies have their limitations. It is difficult to generalise any findings developed from case studies as they provide a portrayal of circumstances in a particular time and place, (Yin, 2014). In other words, one should refrain from projecting or asserting the findings of this study as typical of all marketing specialists, firms, or marketplaces. Despite this limitation, the study's aim to "inform practice, establish the value to the case and/or add to knowledge of a specific topic" (Simons, 2009, p. 24) was achieved. The current study connected with theory by answering calls to eschew simple categorisations and produce a nuanced account of marketing work (Ardley & Quinn, 2014; Skålen & Hackley, 2011; Svensson, 2007). Hence the current study evidenced pluralistic ways in which marketing activities were constituted and practised. Following on, the practice-based findings of this study provide the basis for further studies to test for generalisability of marketing specialists knowledge and their influence.

Having collected the data, instances of marketing specialist knowledge and influence were categorised into the predetermined knowledge domains before being analysed. As well as structure the collected data, this method helped determine whether or not the knowledge domains identified were sufficient or not. Therefore, this methodological approach might be adopted into practice research into the contributions of other management disciplines, such as strategic management, HRM, or CEOs, or other professions altogether. In sum, this study's method contributed to literature by examining marketing's influence using practice theory within multiple case studies.

7.4 Empirical contributions

The current research has also provided several empirical contributions, which have implications for further research. First, previous research has discussed the marketing departments influence in comparative terms regarding strategic decision-making or power with other departments, (e.g., Homburg et al., 2014; Merlo, 2011), or relating to business performance indicators (Verhoef et al., 2011). However, the work-life qualities, relational aspects, and cognitive

machinations of marketing specialists which directly influence business performance have not previously been expressed in practice terms. For instance, Verhoef et al., (2011) discuss how marketing departments might increase their influence by improving relationships with other departments and create stronger perceptions of their capabilities among their executives. While the current study confirms these recommendations, it provides evidence of how these behaviours occur in practice terms, i.e., shared and collective grounds, and how the marketing specialists performed them.

Second, previous studies regarding the competencies of particular disciplines have tended to focus on individual actors performing in isolation, often without their training or company environment adequately accounted for. Therefore, as Carroll et al., (2008, p. 365) claims, these types of studies provide scant details regarding the “subtle, textured, complex, embodied and highly situated mindset that is required”. However, practice theory addresses these concerns by describing the shared, routinised patterns of knowing, understanding, and actions of practitioners (Reckwitz, 2002). In doing so, practice theory reports on the perspectives and situated doings of individuals and cases and also considers the more significant phenomena, the socially defined practices that marketers engage with (Jarzabkowski, 2005; Jarzabkowski et al., 2007).

Third, as well as the practices and praxes that were identified, the participants' descriptions of revelatory influences provide another empirical contribution. Prior research into thinking or reasoning (e.g., Evans, 2011), creative thinking and idea generation (e.g., Kilgour & Koslow, 2009; Oppezzo & Schwartz, 2014) has typically situated these activities within the conscious or unconscious mind of the subject. However, findings from the current research suggest that revelatory ideas were received from an external source. Further, these revelatory ideas, which included entire marketing project concepts, often fulfilled the brief in new and unanticipated ways and proved very profitable for the firm. As shown, the results of revelatory influence have helped generate the fundamental themes and direction of marketing projects, the budgets they require, and the firm's brand personality. In sum, the findings add a practice perspective toward marketing influence studies, identify the shared practices and praxes of marketing specialists, and introduce revelatory influences in project work.

7.5 Managerial contributions

Research shows that marketing departments need to be influential if firms want to deliver a sustainable positive business performance (Homburg et al., 2014; Moorman & Rust, 1999; Wirtz et al., 2013). As CEOs concern themselves with the day-to-day running of their firms, they may appreciate the identification of practices of marketing specialists at every stage of their marketing projects for several reasons. First, CEOs might gain a further understanding and appreciation of the roles, value, and influence that marketing specialists bring to their firm.

Similarly, one CEO accepted that his tagline suggestion was thrown out by the marketing specialists due to his awareness of the marketing-driven process they undergirded their judgment-making. Further, the study may help CEOs recognise the centralised role the marketing specialists occupy throughout their marketing projects, and the market-sensing and market-shaping role they play. To increase their firm's performance, CEOs may also appreciate their marketing specialists' need to access research, resources, networks and sufficient time to optimise their project's settings. Here, the findings show the importance of the consulting practices the marketing specialists undertook and the diverse informing sources they engaged. Findings describe how marketing specialists engage with market research, subject-matter experts, their peers and personnel who contribute to the robustness and optimisation of their project. Also, CEO's may recognise scenarios where the marketing managers champion their target audience's preferences and confront obstructions to change from various stakeholders or shareholders. Hence, a knowledge of the marketing specialists' practices of anchoring, calibrating, and arbitrating may assist the CEO in mitigating any antagonism these practices might cause.

Findings from this research may also help CEOs who are about to undertake a large marketing project. Discussions in each of the case studies describe various marketing projects of firms from heterogenous industries, various approaches, stakeholders, and strategies that the marketing specialists used. Specifically, areas of interest for CEO's may be how marketing specialists moved from collaborative to commanding approaches when needed, or what determined whether their projects were marketing-sensing or market-shaping. Overall, CEOs may appreciate the intricacies and impacts of major marketing projects and the crucial role marketing specialist knowledge and influence at the three levels investigated.

Additionally, the findings might help CEOs accept that an experienced marketing specialist with sufficient knowledge domains might not necessarily or naturally conceive a successful marketing project concept. Instead, a revelatory idea may provide the receiver with an original, appropriate, and detailed concept. There are implications for CEOs here; marketing specialists may wait longer or need leisure time and hope the revelatory ideas will come. Hence, although it is necessary and commendable for the marketing specialists to immerse themselves within their projects, it may be creatively counterproductive without time away from work. Based on the testimonies of those who have experienced revelatory influences, leisure time may paradoxically prove very productive when projects require original creative concepts. Furthermore, when seeking to hire or contract a marketing specialist, CEOs may consider inquiring into how their previous projects were conceived and how they performed. Their responses might indicate the marketing specialists susceptibility to revelatory influences or ideas and indicate the marketing specialist knowledge, practices, and influence they possess.

Following on, as the marketing specialists were the central point in the workflow process of their marketing projects, a support mechanism that CEOs could supply is sufficient time. Having more information gathering and processing time helped mitigate uncertainty and risk, increasing the marketing specialists and their informing sources' ability to develop further, test, and finesse their marketing projects. Further research into how and at what point leisure or non-work time has proved beneficial to marketing specialists may be needed; the evidence provided from this research is already suggestive. For instance, before recommending time for creativity's sake, the revelatory typically occurred after the marketing specialists possessed a great deal of contextual knowledge. This knowledge included research findings, expert advice, and an overall understanding of the firm and its market, although at this point a creative concept or solution eluded them. Therefore, a recommendation for CEOs is that once the creative marketing specialist is in possession of, or perhaps saturated with, their project's relevant facets, and need a revelatory idea; they make leisure a priority.

In firms that either are or are considering becoming market oriented, (Harris & Ogbonna, 2003), an understanding of marketing specialist knowledge domains and their practices and praxes may prove crucial. As shown in Figure 7.1, the marketing specialists' practices involved gathering data, perspectives, and intelligence crucial to their marketing project, and adding it to their existing knowledge domains. Here, knowledge was collected and processed in a centralised manner, allowing the marketing specialist to recognise and address each input's consonance and dissonance with their project's purpose and objectives. In contrast, non-marketing personnel were unlikely to act as a centralised repository or carry the required domains of knowledge to make appropriate judgements concerning a marketing project's settings. Instead, the non-marketing personnel often praised their marketing specialist's, or more specifically their marketing manager's ability to do so. Moreover, market orientation provides a means of de-centralising marketing roles (e.g., Harris & Ogbonna, 2003) and implementing marketing activities (cf. Verhoef & Leeflang, 2009), as opposed to the central role of planning, developing, and appraising them. Therefore, while market orientation is commendable, the marketing specialists' central role in the marketing project is critical, due to the knowledge, practices, and influence outlined in Figure 7.1.

Findings regarding the five knowledge domains will assist managers in understanding how an insufficient marketing specialist knowledge domain may deleteriously affect a marketing project's performance. For instance, insufficient marketing expertise is likely to have broader negative implications for a marketing project than insufficient life experiences, which were largely absent from the planning or appraisal stages. Also, marketing specialists who lack Leadership may scuttle a well-conceived marketing project. Contrarily, marketing specialists whose five knowledge domains are sufficient for the project at hand are more likely to be a positive influence on their projects' settings and their subsequent performances. Therefore, by

taking stock on one's knowledge domains, marketing specialists, or their managers, might be able to determine their strengths and weaknesses and respond appropriately. As shown in Figure 7.1, the practices and influences of marketing specialists and their projects' performances can be linked to their knowledge domains of origin.

This study examined marketing specialists knowledge at each stage of a marketing project, whether the planning, developing, implementing, or appraisal stage. As discussed, marketing expertise featured at almost every stage across each case, whereas life experience was absent from both the planning or appraisal stages across all the cases. This finding suggests that not every knowledge domain was critical for each stage of their marketing projects. Hence, some knowledge domains, i.e., marketing expertise and organisation familiarity are used extensively during marketing projects whereas life experience was less so. However, while some knowledge domains were used extensively, managers might note that the value of the other, less used, knowledge domains should not be underestimated.

Also, an awareness of marketing specialists' knowledge domains and constituent practices and praxes may also be crucial in determining whether a marketer is a specialist or not. These attributes may help determine whether or not the marketing practitioner will be influential among other marketing specialists, the firm, and the market. The findings suggest a marketing specialist status might be conferred upon a marketing practitioner for two reasons. First, the marketing specialists carried a comprehensive array of knowledge domains and practices needed to carry out their marketing projects, which they utilised to reach specific objectives. However, this research categorised both marketing managers and their consultants as marketing specialists. Therefore, the study also concludes that a marketing practitioner who specialises in, say market intelligence, might also be considered a marketing specialist, on the condition they have sufficient marketing expertise. On this point, the marketing consultants recognised their lack of organisation familiarity and readily drew this knowledge from the firm's personnel. Therefore, understanding knowledge domains and their constituent practices may assist in determining whether or not a marketing practitioner or consultant might be considered a marketing specialist.

7.6 Limitations to the study

The following are some limitations to this research. Given the case study methodology used, the limited number of cases, the industries used and their location, the findings are not generalisable to all marketing specialists involved in marketing projects. The research was limited to data collected from four New Zealand firms and the participants' interviews and reflective journal responses, the artefacts collected, and the types of projects studied. However, the multiple interview approach adopted by this research may have gone some way in mitigating limitations related to self-reporting. Thus, data triangulation from interviews, focus groups, journals, and

artefacts supported the findings of this research. The goal was to provide a practice-based understanding of marketing specialist knowledge and influence during marketing projects to deepen insights into theory building rather than provide statistical generalisations.

In-depth interviews, focus groups, reflective journals, and artefact collections were completed according to rigorous qualitative research design methods to ensure the quality and credibility of the research. However, the research was conducted by a single researcher who, as a result, carries the potential for bias. In sum, based on its qualitative methodology, the limiting factors of cases studies, and its capacity for bias, any generalisations made from this study need to be viewed with caution.

7.7 Future research

Further research testing the generality of the findings relating to the knowledge domains, practices, praxes, and subsequent influence marketing specialists have during projects is recommended. As mentioned, the current findings may provide determinants for future quantitative studies testing the correlation between marketing specialist knowledge and its influence. Here, a survey-based investigation using the five knowledge domains, practices, praxes, and the intervening revelatory influences may provide further insights into marketing practitioner work. For instance, survey-based research may determine whether each of the practices identified are significant in the work-life of marketing specialists during their projects. Furthermore, the factors found in this study could be used to survey senior managers on the desired attributes of their marketing practitioners, whether marketing managers, executives, or marketing consultants. Also, these surveys may provide further insight into the frequency, influence, and value of revelatory ideas. The descriptions of each firm and their projects, the participants and their roles, and the research design and findings may assist others in creating hypotheses for judging transferability (Lincoln & Guba, 1985).

Research into each of the marketing specialists' knowledge domains: marketing expertise, organisation familiarity, market intelligence, leadership, and life experiences and their relevance is recommended for several reasons. As seen in within-case analyses, the marketing projects consisted of various stages and each stage varied in their purpose and objectives, whether the planning, developing, implementing, or appraisal stage. Here, various marketing specialist knowledge domains were appropriated severally at each level, whether the marketing specialist, firm, or market level. Further research might determine the significance of each knowledge domain during each stage of a marketing project.

A future study might provide a further understanding of which practices adequately address specific stages at each level. For example, compared to the other levels, what influence do the market level practices of championing, prognosticating, and resonating have during the planning, developing, implementing, and appraisal stages? Findings from research such as this

may help optimise the use of practices and praxes of marketing practitioners at each stage of their projects. Comparing the value of knowledge domains or practices with one another and their impact on each stage was outside the scope of this study and is recommended for future research.

One finding from this research suggests that marketing expertise and its constituent practices are critical for marketing specialists. Therefore, a study might also be carried out to investigate the importance of a marketing degree versus another degree or hands-on experience alone for marketing specialists. Studies investigating the value of marketing qualifications may provide interesting insights as several marketing managers in this study either did not have a marketing degree or any academic qualifications. One of the senior managers even questioned the usefulness of a marketing degree, suggesting that most of the knowledge needed was gained through hands-on experience. Therefore, further research into how various marketing specialists acquired their knowledge might be useful.

Further research might help determine which specific knowledge domains are sought in marketing managers, marketing executives, marketing consultants, and other marketing roles within marketing departments. Also, research comparing the knowledge domains of marketing managers with marketing consultants is recommended. Moreover, a marketing specialist's role does not consist entirely of project work; further research might address the knowledge they need in their work-life in a more general manner.

As mentioned, further research into the prevalence, frequency, machinations, and other aspects of revelatory influence would be beneficial. Research into the frequency they occur in marketing projects, what impact they have on a project's performance, and the significance, reliance, or acceptance marketing specialists attribute to them. For example, the effect of revelatory influences on specific projects such as branding or rebranding projects, promotional messages, or product development might be beneficial. Moreover, further study might uncover a means to differentiate between revelatory influence and insightfulness, where marketing specialists cognitively linked previously disparate ideas or knowledge domains (Schilling, 2005). As the marketing specialists of this research often correlated revelatory occurrences with leisure time, further research might determine what implications leisure time might have for idea-driven projects.

Further research into how the influence of marketing specialists is diffused throughout the firm is recommended. Although existing studies have shown that many traditional marketing roles have been redistributed to other departments (Hagberg & Kjellberg, 2010; Homburg et al., 2014), the findings suggest that the marketing specialists may be partly responsible for their redistribution. As discussed above, a sales department's increase in influence may be due to the initial success of the marketing department's rebranding project; therefore a study into the sales department's influence is recommended. Further qualitative research may determine that the

marketing department's influence increases and decreases cyclically, based on the timing and size of their projects. Also, some of the marketing specialist practices, facilitating, for example, describe how they expedite project-based decisions from others to garner further insight and consensus toward their project. Therefore, practice-based research into how market orientation is carried out within firms is warranted. Finally, findings from this study suggest future investigations into marketing department influence factor in the firm's use of third-party marketing consultants and its effect on the marketing department's influence.

7.8 Concluding comments

While extant literature has provided an extensive list of attributes required by the marketing department, the current research sought to examine something of what marketing specialists do. Specifically, this practice-based research examined marketing specialist knowledge and how and why it is influential. Figure 7.1 provides a conceptual model comprising of this study's practice-based findings. This figure portrays how the marketing specialists' knowledge domains and their constituent practices at each level, plus their consulting, thinking and judgement-making practices combine in their project work. As well as depicting various ways in which marketing specialist knowledge worked toward their projects' settings, Figure 7.1 also shows how revelatory influences intervene and are subsequently managed. Regarding this study's main contribution, Aristotle conceptualised knowledge as the coalescence of data, technical skill, and judgement (Tooman et al., 2016). While concurring with his claim, this research explicates these topics within a marketing specialist context using practice theory, and adds revelatory ideas into the consideration set. The findings suggest that the complexity of the marketing specialists' doings, sayings, thoughts, and collaborations lie in stark contrast to the current perfunctory descriptions of their activities within firms. Future research on this topic may garner further valuable insights into how marketing specialists assist one another, orient their firms, and shape the minds and markets they engage.

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Appendix 1 **Research protocol documents**

1.1 Letter of introduction

1.2 Participant information sheet

1.3 Participant information sheet

1.4 Transcriber confidentiality agreement

1.5 Ethics approval for research

1.1 Letter of introduction

Letter of Introduction



28 January 2015

An Invitation

Dear Sir,

My name is Lee Harrison and I am conducting research for my PhD degree on marketing specialists within organisations. I invite you and your organisation to participate in an in-depth study of how marketing specialists plan, develop, implement, and appraise marketing projects.

Project Title

Marketing specialist knowledge and its influence: A practice approach.

What are we asking for?

In this in-depth case study, I will require your organisation's participation in several ways. First, I would like to conduct one-on-one interviews with four senior managers, including yourself and your marketing manager, who were involved in a recent marketing project for your firm. Second, several weeks later I would like to conduct a focus group made up of people who participated in this project. Third, as this is an in-depth study, I will ask the marketing manager to journal answers to questions and provide me further insights into their thought processes during the marketing project; a further short interview might be required for clarification purposes. Finally, participants in the research will be asked to provide publicly available materials relating to the marketing project that substantiate their points of view. Commercially sensitive documents will not be sought and material or branding that identifies your organisation will not be published. Participation in this research is completely voluntary. With regard to confidentiality, your organisation and its participants will not be identified in the study.

Findings from this research will provide new insights into practices that marketing specialists draw from, how new marketing practices emerge, how such practices influence and profit the firm. The findings may help your firm and your marketing specialists better understand, engage in, and become more productive in future marketing projects.

What happens next?

If I don't hear from you first, I will contact you in around a week to follow up on this invitation. Should you wish, I can answer any questions you may have regarding this research by phoning me on 022 055 1969. If you decide to participate, I will arrange a preliminary meeting, at a time and location most convenient for you, to collect from you the contact details of your marketing manager, and other participants suitable for the interviews and focus group.

I would be very grateful for your firm's participation in this research.

Kind regards

Lee Harrison

Approved by the Auckland University of Technology Ethics Committee on 19 December 2014,

AUTEC Reference number 14/385.

Participant Information Sheet



Project Title

Marketing specialist knowledge and its influence: A practice approach.

An Invitation

Dear Natalie,

You have been identified as someone who could provide a valuable perspective on marketing specialist knowledge and its influence on the firm and marketplace. I would like to invite you to participate in a study concerning the practices marketing specialists draw on when planning, developing, implementing, and appraising a marketing project, and the influence of these practices on the marketing department, firm and marketplace. I am focusing specifically Tourism BOP's Plenty for Everyone project your agency was involved in.

My name is Lee Harrison and I am conducting this research as part of my PhD degree.

The research will involve your participation in a one-on-one interview lasting around 60 minutes at a café near your work. I will provide refreshments. You may also be asked to provide publicly available materials relating to the marketing project to substantiate your point of view.

Your participation is completely voluntary, and no personal or commercially sensitive information will be sought. If you feel uncomfortable regarding any of the information you have given to me, you will be given the opportunity to view the transcription of your interview to avoid any potential misrepresentations and guarantee the accuracy of your account. You will have the possibility to access, modify, or withdraw information you have given, for the sake of accuracy or confidentiality. Furthermore, you may withdraw from the research at any time prior to the completion of data collection if you choose to do so.

I would be very grateful for your participation in this research. Findings from this research will be used to produce a marketing thesis to fulfil the requirements for my PhD, as well as the publication of academic articles, and conference papers.

What are the benefits?

Findings from this research will provide new insights into practices that marketing specialists draw from, how new marketing practices emerge, how such practices influence and profit the firm. The findings may help your firm better understand, engage in, and become more productive in future marketing projects.

How will my privacy be protected?

1. Tourism Bay of Plenty will be identified in this research. Participants will not be named, your association with TBOP will be identified (e.g., third-party marketing consultant) but you will be given a pseudonym.
2. In instances where a professional transcription service is employed, they will be required to sign a confidentiality agreement.
3. All data will be kept on a secure location, with access given to the researcher, my supervisors and participants upon request.

What are the costs of participating in this research?

There are no costs to participate in this research apart from approximately 60 minutes of your time for the interview.

What opportunity do I have to consider this invitation?

Please take a week to consider this invitation. If during that time you decide that you would like further information or clarification about any aspect of the research, please contact me, Lee Harrison, or my supervisor, Associate Professor Mark Glynn (contact details are listed at the end of the sheet). Your participation would very much be appreciated. Please remember that your participation is voluntary, and you will be free to withdraw from the research at any time through the data collection process. I would be grateful for your participation and look forward to discussing this further with you.

I will contact you after a week to seek your agreement. Before the first interview begins, you will need to read and sign a consent form to indicate your consent.

Will I receive feedback on the results of this research?

Should you wish to receive a summary of the findings of this research, you will be able to make a request on the consent form or by speaking directly with me, Lee Harrison.

What do I do if I have concerns about this research?

Any concerns regarding the nature of this project should be notified in the first instance to the Project Supervisor, Dr Mark Glynn, email: mark.glynn@aut.ac.nz or call: 09 921 9999 ext 5813

Concerns regarding the conduct of the research should be notified to the Executive Secretary of AUTEK, Kate O'Connor, *ethics@aut.ac.nz*, 921 9999 ext 6038.

Whom do I contact for further information about this research?

Researcher Contact Details:

Lee Harrison

AUT: Marketing, Advertising, Retail and Sales Department

Tel: 022 055 1969

Email: leejohnharrison@gmail.com

Project Supervisor Contact Details:

Associate Professor Mark Glynn

AUT: Faculty of Business and Law: Marketing, Advertising, Retail and Sales
Department

Tel: 09 921 9999 ext 5813

Email: mark.glynn@aut.ac.nz

Approved by the Auckland University of Technology Ethics Committee on December 19, 2014.

AUTEC Reference number 14/385.

1.3 Participant information sheet

Consent Form



Project title: Marketing specialist knowledge and its influence: A practice approach.

Project Supervisor: Associate Professor Mark Glynn

Researcher: Lee Harrison

- I have read and understood the information provided about this research project in the Information Sheet dated 16 March 2015.
- I have had an opportunity to ask questions and to have them answered.
- I understand that notes will be taken during the interviews and that they will also be audio-taped and transcribed.
- I understand that I may withdraw myself or any information that I have provided for this project at any time prior to completion of data collection, without being disadvantaged in any way.
- If I withdraw, I understand that all relevant information including tapes and transcripts, or parts thereof, will be destroyed.
- I agree to take part in this research.
- I wish to receive a copy of the report from the research (please tick one): Yes
No

Participant's signature:

.....

Participant's name:

.....

Date:

Approved by the Auckland University of Technology Ethics Committee on 19 December 2014,
AUTEK Reference number 14/385.

Note: The Participant should retain a copy of this form.

1.4 Transcriber confidentiality agreement

Confidentiality Agreement



Project title: Marketing specialist knowledge and its influence: A practice approach.

Project Supervisor: Associate Professor Mark Glynn

Researcher: Lee Harrison

- I understand that all the material I will be asked to transcribe is confidential.
- I understand that the contents of the tapes or recordings can only be discussed with the researchers.
- I will not keep any copies of the transcripts nor allow third parties access to them.

Transcriber's signature:

.....

Transcriber's name:

.....

Transcriber's Contact Details (if appropriate):

.....

Date:

Project Supervisor's Contact Details (if appropriate):

.....

.....

.....

.....

Approved by the Auckland University of Technology Ethics Committee on 19 December 2014,

AUTEC Reference number 14/385.

Note: The Transcriber should retain a copy of this form.

1.5 Ethics approval for research



A U T E C
S E C R E T A R I A T

19 December 2014

Mark Glynn
Faculty of Business and Law

Dear Mark

Re Ethics Application: **14/385 Marketing specialist knowledge and its influence on marketing departments, firms and the marketplace: A practice approach.**

Thank you for providing evidence as requested, which satisfies the points raised by the Auckland University of Technology Ethics Committee (AUTECH).

Your ethics application has been approved for three years until 19 December 2017.

As part of the ethics approval process, you are required to submit the following to AUTECH:

- A brief annual progress report using form EA2, which is available online through <http://www.aut.ac.nz/researchethics>. When necessary this form may also be used to request an extension of the approval at least one month prior to its expiry on 19 December 2017;
- A brief report on the status of the project using form EA3, which is available online through <http://www.aut.ac.nz/researchethics>. This report is to be submitted either when the approval expires on 19 December 2017 or on completion of the project.

It is a condition of approval that AUTECH is notified of any adverse events or if the research does not commence. AUTECH approval needs to be sought for any alteration to the research, including any alteration of or addition to any documents that are provided to participants. You are responsible for ensuring that research undertaken under this approval occurs within the parameters outlined in the approved application.

AUTECH grants ethical approval only. If you require management approval from an institution or organisation for your research, then you will need to obtain this.

To enable us to provide you with efficient service, please use the application number and study title in all correspondence with us. If you have any enquiries about this application, or anything else, please do contact us at ethics@aut.ac.nz.

All the very best with your research,

A handwritten signature in black ink, appearing to read 'Kate O'Connor'.

Kate O'Connor
Executive Secretary

Auckland University of Technology Ethics Committee

Cc: Lee Harrison leejohnharrison@gmail.com

Appendix 2: Within-case analyses

2.1 Tourism Bay of Plenty

2.1.1 List of evidentiary sources

For TBOP, one-on-one interviews were conducted with their CEO, the marketing manager, a board member, a third-party marketing agent, and a third-party marketing consultant. The five semi-structured interviews were audio recorded and averaged 83 minutes each, with transcripts averaging 26 A4 pages each. The focus group consisted of three tourism businesses operators, whose audio recorded was 93 minutes long which generated a transcript of around 41 A4 pages. The interviews were professionally transcribed and then double-checked by the researcher. The notes in the marketing manager's reflective journal, minus the questions the researcher asked, totalled 775 words.

Multiple documents and artefacts were obtained from TBOP. TBOP's digital artefacts consist of six published TV commercials and an unpublished concept commercial clip, a newspaper article, and six examples of web banners. Physical artefacts consist of a three page call to action initialising the new marketing campaign; a contract of services for the marketing manager prior to becoming a TBOP employee; a four-page target market summary; four pages of printed emails between TBOP's marketing manager, CEO, and the marketing consultants' discussions and recommendations; a three page research brief provided by TBOP to the marketing consultants; six different bundles totalling 105 presentation slides published by the marketing consultant firm made up of concept pitches, research results, campaign developments, marketing summaries, and marketing campaign recommendations; two full colour half-page newspaper ads. The interview and focus group transcripts, the marketing manager's reflective journal and the marketing artefacts were examined for evidence relating to the research questions about marketing specialist knowledge and influence. The following section addresses the research question RQ1: How was marketing specialists' knowledge used when planning, developing, implementing, and appraising the marketing project.

2.1.2 RQ1: The marketing specialists' knowledge

Tourism Bay of Plenty's rebranding project drew from the specialist knowledge of several marketing specialist sources: the marketing manager, a marketing agency, two of TBOP's board members, a market research agency, and a marketing consultant. The main marketing specialist began with TBOP as a third-party contractor and became a full-time employee, i.e., marketing manager, during the rebranding project. A marketing graduate, the marketing manager underwent mentoring in several marketing fields before working for TBOP. Her mentoring was undertaken in large firms such as DB, Vodafone, and ASB, and included scientific marketing,

research, communications, systems development, agency briefs, marketing strategy, and account management. Her experiences proved valuable; one of TBOP's board members summarises the expectations TBOP had when hiring their marketing manager:

“Being able to recruit [our marketing manager], we have confidence that we have an exceptional level of skill and expertise **to not only develop but maintain and manage and implement.**” (C1:P1).

The board member's list of expectations of a marketing specialist's knowledge is described and analysed further in this chapter. The marketing specialist is expected to bring with them the organisational and marketing nous to operate the firm's current branding and offerings and the competence to revise them. Next, third-party marketing contractors also worked closely with the marketing manager on the project. The contractors included a market research company, a brand management company, and a marketing consultant who managed the project during a period of the marketing manager's absence. Also, two of TBOP's board members had also worked in marketing, one with similar experience to the marketing manager, the other with a marketing research background. To plan, develop, implement, and appraise the rebranding project, these sources brought their marketing specialist knowledge to bear on their respective areas of responsibility.

Before the MV Rena's grounding, TBOP's marketing activity was described by one participant as 'a piecemeal approach – there was no consistency at all' (C1:P3). In other words, the marketing budget appeared to be utilised on a subjective, rather than strategic, approach by TBOP's previous administration. To redress this, TBOP post-Rena developed a brief which outlined the challenges they faced and in what areas they required marketing support. Essentially, TBOP wanted to partner with a marketing agency to develop a high-level, mid-term, integrated messaging strategy which resonated with the domestic market at a budget of around \$200,000. The brief explains that TBOP wanted to determine the Bay of Plenty's position in the market and their area's unique selling proposition. Hence, TBOP wanted to produce compelling visual and textual marketing collateral to re-open the Bay. Incidentally, the term marketing collateral is an industry term for sales support tools or media, such as brochures, billboards, or posters. Therefore, TBOP wanted to create marketing collateral to entice domestic visitors, support existing tourism operators, and attract new tourism businesses to the Bay of Plenty area.

With these aims in mind, the marketing manager asked various marketing agencies to pitch for TBOP's rebranding project. The winning agency was described as having several compelling attributes. As well as their purpose built and visually appealing creative pitch, a significant factor that won TBOP's contract was the agency's experience. At the time of the interview, the agency TBOP contracted had been operating for in the region for around 23 years. Also, the company was a full-service brand communication agency with experience in the tourism sector.

Moreover, the agency had a proven record with rebranding companies and demonstrated a willingness to work with TBOP's business objectives, impediments, and risk profiles. As shown, expertise, presentation capabilities, alignment with TBOP's objectives, and a track record of proven creative outcomes were essential prerequisite marketing capabilities for the marketing specialists. These attributes suggest that marketing expertise, organisation familiarity, and leadership skills were required for the rebranding project.

2.1.2.1 Planning the marketing project

In planning their marketing project, the marketing specialists, both the newly appointed marketing manager and marketing consultants, first ascertained TBOP's business objectives, its impediments, and its level of risk adversity. The first two elements played a foundational role in the planning of project's architecture, with the third, risk adversity, playing an essential role in the promotional planning. To begin, four key objectives which were provided to agencies in TBOP's Brand Platform presentation are provided below. The sub-bullet points starting with 'How:' are the responses by the winning marketing agency to TBOP's objectives:

1. Become the fourth top regional tourism destination for bed nights.
 - How: by increasing visitor length of stay by an average of one night (LOS + 1) by targeting high potential groups with compelling messages.
2. Increase the average visitor spend.
 - How: promote activities, attractions, events, deals, and incentives.
3. Strengthen our reputation as an enabler for new tourism attractions and events.
 - How: be seen to be promoting activities, attractions and events. Be seen to be effective in attracting additional visitors.
4. Launch a compelling and unified brand story and identity for the Bay of Plenty.
 - How: Consistency of message, positioning, personality, and look and feel.

While these objectives play a significant role in appraising the marketing project, their role in planning has several aspects. First, the objectives focused the marketing specialists' planning on addressing performance indicators such as bed nights and visitor spend, as well as shaping the market's brand perception and expectations. Second, the objectives served to justify a marketing approach, called the Brand Roadmap by the agency, which delved deeply into understanding TBOP's position and its market.

TBOP's marketing manager's first task was to understand the target market's perception of the Bay of Plenty post-Rena, as well as the Bay's appeal. Prior, TBOP's G.M. had invented the tagline 'Your Place to Shine' and suggested it be used as part of the Bay's repositioning campaign, tasking the newly appointed marketing manager to use it for the project. Although the marketing specialists involved in the project felt the G.M.'s tagline might have merit, they also proposed using research and a Brand Roadmap process to fulfil the brief. As the marketing agent recalls:

“[We] took them through what we call our **Brand Roadmap process**, Brand Roadmap, so we have a Brand Roadmap process which is kind of a loosely a four-stage project. It starts with the discovery phase, then it starts around articulating a competitive advantage phase, defining what the competitive advantage is, then it goes through a strategy phase, and then it goes into a tactical implementation phase, and I think when Tourism Bay of Plenty came to us **they'd probably thought they'd done the first three things.**” (C1:P2).

By understanding TBOP's objectives, the marketing specialists used their marketing expertise to recommend the appropriate approach and sequence. In this case, the marketing specialists rewrote the initial, tactical brief into a more comprehensive and strategic marketing plan. Hence, TBOP was led to consider the Discovery phase, the Competitive Advantage phase, and the Strategy phase before deciding on a tagline (the Tactical Implementation phase). However, the marketing specialists, both TBOP's and the agency's, would not dismiss 'Your Place to Shine' as an appropriate tagline without first carrying out the first three phases. Hence, the Brand Roadmap was designed to develop findings and evidence that would justify its collateral decisions.

Third, although TBOP's four objectives were written in broad terms, the marketing specialists were able to prescribe specific responses to fulfil them. As shown these responses are in the 'How' sub-section beneath each of the objectives and help form a plan for reaching each objective. For instance, to meet the objectives, the marketing specialists have directed TBOP towards developing effective promotions derived from their rebranding procedure. In other words, the marketing specialists' knowledge of the appropriate marketing principles and approaches assisted TBOP in planning to fulfil its primary objectives.

As well as the business objectives, the marketing specialists sort to understand and work with TBOP's impediments, which included its deadlines, budget, and as mentioned, its risk tolerances. With both TBOP and the marketing specialists understanding the limits or conditions undertaking the marketing project, both had a view of which parts of the marketing project would or would not undertake the more formal or analytical approach. The marketing agent puts it this way:

"We understand, you know, sometimes you've got to get some stuff done in the next two weeks... Both the agency and the client understood that some things we just have to do right now and **if it's not quite 100% right it doesn't matter**; we can't over analyse it, we've got to get it done.” (C1:P2).

Therefore, by identifying the budgeting and timing restrictions, the marketing specialists were able to plan more effectively. While pragmatic, this approach to planning also allocated time and money to more strategic and long-term resources. Therefore, during the planning process marketing specialists scrutinised both strategic and tactical measures in order to implement practical and constructive outcomes. However, due to the lack of time, the short-term

restrictions moved the marketing specialists away from procedural approaches toward leaning upon experience, best guesses, and intuition. The marketing agent explains:

“When you choose a marketing partner you’ve got to have someone who has a proven track record in delivering when they don’t have all the data. So, **when you don’t have all the data** you have to use intuition, experience, understanding and risk analysis to understand where you want to go.” (C1:P2)

Here the importance of marketing specialist knowledge has shifted from knowing an appropriate marketing approach or procedure such as the Brand Roadmap, to ‘what does experience say?’ Here, the marketing specialists aimed to produce a marketing product that is likely to reach an objective without the time, resources, or benefit of research and analysis. In this case, TBOP and the marketing specialists both acknowledged and agreed on when and why a marketing procedure has been substituted for intuition or their best guess. Importantly for the marketing specialist, the term ‘proven track record in delivering’ suggests that although intuitive work may save time and money in the short-term, it is the project’s results that matter. Implicit is TBOP’s trust in their marketing specialists’ decision-making, and in TBOP’s own ability to discern which marketing proposals, sans-research, are appropriate. As a side note, as well as confidence toward their marketing specialists, TBOP’s CEO and governance also displayed confidence in their own knowledge of marketing principles. For instance, the board member with a marketing background demonstrates an understanding of parameters guiding the marketing process:

“Marketing, to me, is about understanding the consumer and creating an offer that delivers to their needs and wants and **having everything aligned within a business to deliver that with excellence.**” (C1:P1)

While the marketing parameters described above are broad, they served to guide her marketing ethos and her decision-making as a board member. Next, as well as TBOP’s impediments of time and budget, risk tolerances also played a significant part in the planning of the marketing project. The marketing specialists sought risk tolerances by pitching experimental or avant-garde concepts at TBOP in the planning phase. In other words, various controversial concepts were presented by the marketing agency to determine the possible attitudinal responses of TBOP, their stakeholders, and their market:

“**We gave them some options, and we outlined the risk of each one**, ‘this one’s you know, this one’s a more edgy concept and could radically change our numbers but it’s a bit more risky – it may or may not work. But here’s some other ones that are a bit safer but may not get the cut-through but they’re definitely going to work’” (C1:P2)

As shown, apart from ascertaining TBOP’s artistic tendencies, the purpose of the exercise was also to determine the balance of appropriateness to the brand and the likelihood of ‘cut-through’. Cut-through is a phrase used in the advertising industry which represents the market audience’s resonance or recall of an advertisement’s message. Therefore, the marketing specialists’

knowledge played an essential role in this marketing project planning phase. Here, the marketing specialist knew how to present marketing strategies of differing riskiness, as well as outline the risk profile of each strategy. By presenting a variety of options to consider, the marketing specialists fulfilled their planning responsibility, leaving TBOP the responsibility to decide the appropriate creative setting for their project.

In sum, the marketing specialists' knowledge domains used during the planning phase were marketing expertise in rebranding, organisation familiarity with TBOP and its aims, and building consensus with leadership. Using marketing expertise and market intelligence to understand the composition of TBOP's branding, the marketing specialists were able to recognise how TBOP's marketing plan may achieve its business objectives. Having consolidated the brand architecture and TBOP's business objectives, impediments, and risk tolerances, the marketing specialists proceeded with developing the marketing project.

2.1.2.2 Developing the marketing project

Following on from planning, the marketing specialists sought to develop the project by seeking clarity regarding the Bay of Plenty's market appeal, TBOP's strategy, and the market itself. Designed to develop effective marketing collateral, multiple workshops were held as the marketing specialists, and stakeholders from TBOP met to discuss various project elements. Using models, visuals, and brainstorms during these workshops, a deeper understanding of the Bay of Plenty's appeal, TBOP's objectives and risk tolerances, and the current market was sought. As a marketing agent involved explains:

"We're in this workshop phase; whether it be a discovery workshop or a competitive advantage workshop or a strategy workshop or a tactical workshop, we're working with [TBOP] on that. We do test those things out, so with prototypes and concepts and go **is this pushing it too far or is this not pushing it far enough?**" (C1:P2)

As indicated, the development phase involves workshops and discussions with selected TBOP staff about various aspects or phases of the project. During these meetings, concepts and ideas based on the Brand Roadmap are discussed. The Brand Roadmap has a four-stage process: the discovery phase, the competitive advantage stage, a strategy stage, and the tactical implementation stage. Notably, the marketing specialists did not begin the discovery phase by conducting primary research on the local market, but by identifying their target audience using secondary data. Their analysis found their target audience were from Auckland and the Waikato between 30 to 55 years old. Also, their secondary target market were slightly older people, as well as families with children.

Further, one marketing consultant began to benchmark regional tourism operators (RTOs) and analyse common challenges these RTOs faced, as well as an analysis of their approach to marketing campaigns. The process then determined the external brand promises: identifying the character of the Bay and the tourism industry, what the Bay promises to visitors, as well as the

Bay's internal brand promises. These workshops clarified the Bay's personality, i.e., being welcoming, friendly, smart, and having a beach and café-culture and developed what they termed the Bay of Plenty's brand essence, which was coined 'laidback/sophistication'. It was decided this phrase summed up or benchmarked the Bay of Plenty's appeal by reflecting a unique blend the region's laidback culture with its sophisticated retail and accommodation offerings.

Although the brand essence, laidback/sophistication had been identified, its use in the developmental process is notable. Specifically, the term laidback/sophistication is not explicitly used in marketing or branding collateral; rather its use is in providing clarity and internal consistency to marketing campaigns. As the marketing agent explains, laidback/sophistication was only used internally to ascertain the fit of decisions around collateral development:

“Once we've got that essence then we'll start creating the collateral and go back out of the [Brand Roadmap]. We're always measuring a visual or an ad or something. **We're always measuring it against that idea**, is that laidback/sophistication? And then when Tourism Bay of Plenty are looking at their sponsorship opportunities or things they're looking at they can sit there and go is that laidback/sophistication, **does it carry that essence?**” (C1:P2)

Following on, the marketing specialists proceeded by developing a series of marketing hypotheses to test the Brand Roadmap's findings. For instance, visuals and taglines or catchphrases including 'Plenty for Everyone' were developed and, along with the incumbent 'Your Place to Shine', were shown to target audiences by an independent researcher. First, respondents agreed that laidback/sophistication accurately depicted the Bay of Plenty's essence, confirming that the characteristics that differentiated the Bay to competing destinations had been correctly identified. Second, the research found the tagline 'Your Place to Shine' was not a fit, as it lacked the sociability and the time-off-work aspects people enjoyed about the Bay, neither did it reflect the brand essence (laidback/sophistication); whereas 'Plenty for Everyone' generally received positive responses. Third, suitable visual presentations of the look and feel of the Bay developed by a creative consultancy were also identified. Finally, the findings resonated with TBOP's CEO and board members, who felt the process had delivered a repositioning message that was authentic, aspirational, and appropriate for TBOP's marketing goals. The following monologue is from an interview with one of TBOP's board members and summarises the procedure of the project's development:

“There was a **rigorous process** that ran behind this, and a **marketing discipline** that went through the creation of different taglines and... universal selling propositions that could embody and deliver for the Mount.

And those were developed in a number of ways. So, some people had a great idea and thought it was worthwhile putting in. There were others that came out of insights in terms of what visitors said to us, what stakeholders said to us. So, there was quite a bit of research and data gathering that went into that **process**.

Then that process was distilled down, it was **sanity checked** around what other people were saying, was this unique, was this relevant, was this truthful, was it authentic? How would it overlay to different groups?

And then that was **tested**. And then your 'Place to Shine', as well as 'Plenty for Everyone', went into **testing** and a couple of others I can't even remember off the top of my head.

And 'Plenty for Everyone' came out on top. And so, a call was made at that point to move forward with that. But there was as much of a **rigorous process** as possible that could be **statistically significant**." (C1:P1)

As shown, the development phase underwent a rigour that funnelled together processes and principles of the marketing discipline with the context's creative ideas, perspectives and market research. As depicted, this conceptualising process integrated the various data, objectives, restrictions, and stakeholder ideas so that the marketing specialists might develop TBOP's brand essence. Next, the marketing specialists produced, tested, and settled on marketing collateral that TBOP's senior manager and board were confident investing in. Evident and valuable in the process was that marketing specialists accepted the various ideas of each stakeholder and filtered out the inappropriate ones using market data and 'sanity' checking. During the development stages, these attributes served the marketing specialists by removing the tyranny of navigating or rejecting the opinions of their colleagues or superiors. TBOP's marketing manager sums up process used on developing the project:

"The process worked well... because **it took everyone's personal opinions out of the process** and meant that **we came out with some clear feedback** around all of those elements... and 'Your Place to Shine' was chucked out... it felt like it was too hard work for somewhere that you might come on holiday." (C1:P3)

In sum, developing the project revolved around clarifying what the Bay of Plenty offered visitors as well as testing and producing material which promoted this offer in an appealing way. Although stakeholders were able to forward their ideas, the development process caused the marketing specialists to consider several things first: the essential value of the Bay, their competitors, the target market, and what messages the promotional material should portray. As shown, this process provided the rigour which pointed TBOP toward appropriate branding solutions with which to test on the market prior to implementing. As described, within the development process were techniques that the marketing specialists employed to reduce interference from the personal perspectives or preferences of stakeholders, despite their hierarchical position. In other words, the marketing specialists' knowledge in this developmental stage primarily involved leadership and people skills as well as marketing expertise.

2.1.2.3 Implementing the marketing project

Having completed the Brand Roadmap and confirming its findings with target audiences, TBOP moved toward launching a marketing campaign. Implementing the marketing project involved acquiring photographic and film footage for print and digital media, including five television

commercials. At the time, the marketing manager took a leave of absence and another marketing consultant was employed to manage the promotional aspects; the lead marketing manager returned intermittently to assist. To resource the project, creative companies were contracted and briefed so that photographers and videographers would capture the essence of the region for promotional footage; the CEO explains:

“It was the development of the television commercials, what is it that we saw needed to be captured? What **had we developed that needed to be captured, that captured the essence of the area?** That was an evolution of thought, really, so build off laidback/sophistication, **build off the juxtaposition, build off sociability**, what did we need to capture in the can and what partners did we need to bring into that? We needed media companies, we needed media placement companies, we needed to work with our creative company.” (C1:P4)

The consultant who replaced TBOP’s marketing manager further explains the brief TBOP and the creative companies followed to gather material for the project:

"On one hand, we did a series of photographs and video footage which was for the TVC... we chose [the locations] and that was to **create the juxtaposition**, ok and we also wanted to create a spread across the region so it wasn't just focused on one area... for example White Island, to be involved in that, however they were not named. So, because it was the money that we were spending to represent the Bay of Plenty, it wasn't specifically about a tourism product... So effectively it was there was Plenty for Everyone and so the whole concept of the campaign was to show the age demographic, the variety of experiences and then also the different, whether it's a family or a couple or young friends gathering together. So, we tried to capture all of those things in the ten shots that we had to do... What we were trying to do was **create hero photography** for Tourism Bay of Plenty.” (C1:P5)

As shown, the brief included every major finding distilled in the planning and development stage of the project. These findings provided the creative companies clear objectives in the kind of footage TBOP required. For instance, a variety of activities that tourists partake in needed to be photographed or videoed in juxtaposition; a laidback version and a sophisticated version. Also, as the promotional material was for the Bay of Plenty as a whole, specific tourism destinations would not be named in the ads. The target demographic of 30 to 55-year old and older people as well as families with children were filmed and photographed. As the marketing consultant explained, the findings provided the criteria for the campaign’s ‘hero photography’. The marketing agent provides further insight into the thought processes involved in capturing the right footage:

“We could represent [Mount Manganui] really close up, we could do a landscape shot which shows the beach. We could take it at night, we could take it at the day, we could light it differently, **there's a mood that we want to capture** around that image, so we've decided in the TVC how we portray the Mount is a family walking around the Mount having a great experience. It's **not showing the Mount itself being so literal...** Because that actually wasn't what people wanted. What they wanted to see was here's me and the kids doing this great walk that we can all do. And if grandma doesn't want to go for a long walk, its only 20 minutes round. Or if the kids want to run up and around it for an hour and I can wear them out its great, it's safe. They can see some

wildlife and mum and dad can have a lovely lunch afterwards at a café right outside it. So, it's not like they're going out for a hike. So, **it's taking that idea of sociability, putting that into a 5 second clip on a TV ad to get the feel of that.**" (C1:P2)

In terms of marketing specialist knowledge, several aspects have been discussed. First, they understood TBOP's objectives and restrictions and how these would frame the marketing project. Second, they knew how to use marketing tools such as the Brand Roadmap to provide a basis for TBOP's rebranding. Third, knowledge of marketing disciplines such as market research and analysis were used to develop the findings from the Brand Roadmap. Fourth, the marketing specialists also knew how to brief creative professionals enlisted to capture promotional material. Regarding the brief, the marketing agent above demonstrated an aptitude for cinematography. In sum, the marketing specialists applied knowledge from their marketing backgrounds, market research, knowledge regarding their firm, and natural or personal experiences to develop the project. Regarding the use of one's natural talents, the marketing manager, who was taking an extended leave at the time, was brought back to help with the voiceover for the advertisements. The CEO explained:

"The television commercial. We needed a voiceover, and it took us quite a few attempts to get it right. It wasn't till the delicacies of the lifting of the voices at certain spots and having exactly the right type of female voice. To identify that one, that we actually all went, 'Ah, we've got it.' **It was [our marketing manager] that was involved in** that very fine, delicate part of **getting it right.**" (C1:P4)

The CEO of TBOP sums up this aspect of marketing specialists' knowledge in the following way:

"**Attention to detail** and a really **clear understanding of the audience.** That's really what it came down to." (C1:P4)

As shown, the marketing specialists understood not only TBOP's target market and how to develop marketing project, they also demonstrated an understanding of tactical issues and operational delivery. In this case, tactical knowledge included brief writing and how the cinematography should look and feel. Operational delivery included managing the intricacies of tones and inflections in the TVC's voiceover. Also of note in TBOP's implementation phase, the marketing specialists' knowledge extends into areas such as managing personnel, budgets, and time. As an added tactical move, TBOP's marketing specialist temporarily renamed their project 'Plenty to Love', re-publishing marketing collateral to align with a national reality TV show which was filming in the Bay of Plenty. Briefly, the implementation phase demonstrated how TBOP's marketing specialists progressed from the planning and developmental phases by applying various aspects of their marketing and management knowledge into launching their project. Therefore, in order for the project to resonate with their audience, the marketing specialists applied their life experiences, marketing expertise, and knowledge of their target market to the project's settings.

2.1.2.4 Appraising the marketing project

The appraisal of the rebranding project provided added insight into the marketing specialists' knowledge. As discussed, TBOP's objectives were increasing visitor bed nights, average spend, strengthening their reputation and launching a compelling and unified brand story and identity for the Bay of Plenty. These objectives served as KPI's when the marketing specialists were appraising the rebranding project. From the participants' responses regarding the project's outcomes, two main topics of discussion emerged: how the appraisal data was collected, and the challenges with appraising the project's performance. Discussion around these topics provide further understanding into TBOP's marketing specialists' knowledge.

Data used for measuring the rebranding project against its objectives was collected from several sources. These sources included TBOP's dashboard, surveys, column inches, and various forms of feedback from stakeholders. TBOP's dashboard is a computer program connected to tourist sites and accommodation providers. The dashboard's function is to record and report visitor data such as bed nights and spending. The marketing specialists also conducted surveys and recorded the column inches of unsolicited articles written on the re-branding campaign and its associated activities. Other forms of feedback include mirroring and direct feedback. The marketing agent described mirroring as when a tourism operator or stakeholder retells the marketing project's story in their own words, retaining the essence, or sometimes the same words, as the original. As the agent puts it:

“If they start **mirroring those things back to you**, we know that they're getting it.”
(C1:P2)

Direct feedback from stakeholders is another form of appraisal. Although less quantitative than dashboard reports, column inches or survey results, direct feedback from stakeholders such as tourism operators and local government is no less weighted. After briefing local government on the project's performance and related growth in the region, the CEO reported their feedback strongly suggested they had confidence in TBOP's future endeavours:

“**Bottom line.** [Local government] look at what are the **results**, and we deliver those every six months. Evidence of their satisfaction is the fact that they continue to fund us and that the questions that are asked of us are generally not performance questions. They are questions around what are you doing next? **This is exciting, fantastic, what are you doing next?...** They're rapt to see that there's actually some strong marketing and that **we've actually developed a marketing image that is clearly true.**” (C1:P4)

Although appraisals with data and feedback mechanisms from stakeholders were vital, the project was also appraised by its impact on performance within TBOP's marketing team. Rather than the piecemeal or reactionary approach TBOP had taken in the past, the rebranding project provided a strong foundation for TBOP to provide a consistency of marketing messaging and collateral for the medium term. For instance, the marketing manager reports an ease in

developing further collateral in the short to medium term, having consolidated the region's brand essence, the tagline, and the look and feel of the collateral:

“What we have now is very **consistent communications**, so everything that we produce is easy to produce, the agency knows what they're doing, we know what we're doing. When it comes through as a piece of artwork we can all look at it and go yeah, it's consistent, **it meets our brand architecture.**” (C1:P3)

In addition, two other ways the marketing project was appraised were raised by one of TBOP's board members. These subjective evaluations were termed cut-through and vibrancy of the marketing project. Cut-through was described by the board member in terms of the project's positive resonance with its target audience. Vibrancy describes the positive light the campaign placed on the region and relates to the third objective of the marketing project: to strengthen TBOP's reputation as an enabler for new tourism attractions and events. The board member explains:

“In the end, any RTO is about delivering a positive economic benefit and health to the region. And I suppose in health, in terms of economic benefit, is in terms of what people spend and how they spend it and where they spend. But it's also about **the vibrancy of the region**. It's about **creating opportunities for people to create their own opportunities.**” (C1:P1)

In other words, if the project produced a sense of vibrancy for the Bay of Plenty, tourism businesses as well as tourists were more likely to be attracted to the area. Projecting vibrancy, it was argued, is conducive to growing business confidence and momentum toward progress. For instance, according to several participants, attracting and situating more luxury accommodation providers would be a key growth catalyst for the region. Although anecdotal, the addition of this insight rounds off the variety of methods used to appraise the marketing project. In sum, quantitative data, qualitative feedback, and subjective assessments played key roles in the appraisal of TBOP's rebranding project.

Despite the variety of feedback mechanisms discussed above, there were several challenges with appraising the project. Although deleterious, these challenges were well known in the tourism industry, from Governmental to RTO levels, for compromising the accuracy of reporting. These challenges include a lack of instant feedback or results from campaigns and inaccurate appraisal methods. For instance, the lack of instant feedback or results is discussed by one of TBOP's board members:

“Tourism by virtue of the way in which people plan their holidays isn't immediate. So, if you had a sale in a shop today, you'd get sales straightaway. If you do a marketing activity offshore today, **you'll see the results in four, six months, 12 months** down the track.” (C1:P1)

As shown, tourism generally has a delayed return on marketing investment. Additionally, inaccurate appraisal methods such as the inability isolate marketing's contribution to tourism

growth and unreliable data collection methods affected the accuracy of appraising TBOP's project. First, with regard to isolating the project's contribution to growth, there are many factors contributing to visitor numbers and their spending in the region, as TBOP's board member puts it:

“So, the Chinese market **will grow, regardless** of what Tourism Bay of Plenty does. The cruise ship market **will grow, regardless** of what Tourism Bay of Plenty does.”
(C1:P1)

However, the CEO was more optimistic about the contribution TBOP's marketing campaign has made, citing it as, among other factors, a major contributor to the region's growth:

“Now, the proof source in that is what we've done over the last two years with an injection of \$200,000 extra... we can give a return of this amount, i.e., \$40,000,000 has been brought into this region extra that it didn't have two years ago. So, a return on investment for **\$200,000 is \$40,000,000, so not a bad return on investment**. Their argument will be how much influence did we have on that as a marketing organisation. Of course, we'd like to scream that we have been the heavy influence on that, **but it has had other factors that we can't deny**: P.S.A. [an airborne bacterial disease which was damaging the region's Kiwifruit industry] has gone, GFC [the Global Financial Crisis] has gone, the weather's been fantastic, backed up by a fantastic marketing campaign.”
(C1:P4)

Although major inhibitors to visitors coming to the region were declining, and with beaches returning to their natural beauty, the CEO is unable to precisely quantify their marketing campaign's impact. Instead, the CEO cites the marketing campaign having a collaborative affect along with other positive factors such as a favourable summer climate. A further challenge with appraising TBOP's marketing project was also identified: the unreliable data collection methods used in measuring visitor nights and spend. One of TBOP's board member explains:

“**Data is only as good as the accuracy of the data that's provided** by those people in the first place. And so, if you have half of the hotels or motels one month not providing accurate data or forgetting, you only get a view of what is captured. But also too, here, you look at the huge number of beaches. That's not captured in terms of room nights.”
(C1:P1)

As seen, unreliable collection methods also diminish the accuracy of appraising data such as visitor nights and spend. Hotels might forget or neglect to report data of their visitors, which affects the results collected by TBOP's dashboard. Therefore, weight given to one specific appraisal method, whether quantitative, qualitative, or anecdotal in nature, cannot alone be justifiable evidence of growth. Rather, the marketing specialists' appraisal and reporting methods have included all the approaches described above.

As discussed, the quantitative data provided by accommodation providers, other qualitative feedback, and subjective assessments regarding the vibrancy and cut-through of messaging were used in the appraisal process. Findings from only one or two of these feedback mechanisms would provide inadequate conclusions. However, despite the inadequacy of each collection

method, if each of them collectively suggested growth in visits, spending, and vibrancy, the marketing specialists may claim some credit for the result. Here, despite factors such as climate and visitor momentum, the marketing specialists claimed their specialist knowledge in branding and messaging was essential in reaching the firm's business objectives.

2.1.2.5 Marketing specialists' knowledge within projects

To sum up the marketing specialist knowledge used in TBOP's rebranding project, several overall themes emerged. First, the marketing specialists, whether in the managerial or consultant roles, were selected for their proven expertise in developing and executing marketing projects including rebranding projects. In this project, their understanding of how to develop and implement a brand's architecture played a significant role in the rebranding process. Second, the marketing specialists', particularly the marketing manager's, understanding of the tourism industry, TBOP's objectives, risk tolerances, and political climate was essential. Further, the marketing specialists' understanding of their target market and their competitor's offerings and activities were also crucial to developing the marketing project's settings. For example, by understanding key aspects the regional tourism organisations around New Zealand, the marketing specialists were able to more accurately identify TBOP's competitive advantage. Fourth, the marketing specialists used their expertise, TBOP's business objectives, and market intelligence as leverage to unify key stakeholders, including antagonists, to sign off on the project's settings. Lastly, the marketing specialist utilised their knowledge of humanity, so that their project would resonate with its audience as well as being technically sound.

However, certain knowledge domains played a more significant role than others during each phase of the projects. As described, during the planning phase the marketing specialists' marketing expertise, organisation familiarity, market intelligence, and leadership came to the fore. Next, during the projects' developing stages, marketing expertise, leadership, and life experiences were pronounced. Following on, marketing expertise, market intelligence, and life experiences were crucial in during the implementation phase, whereas marketing expertise and market intelligence were key as the project was being appraised. Overall, the marketing specialists' knowledge, whether the marketing manager's or the consultants', played a fundamental role in influencing the rebranding project, TBOP's staff, stakeholders, and board, and its target audience.

2.1.3 RQ2: The influence of marketing specialists' knowledge

To help answer RQ2, this section describes and analyses TBOB's marketing specialists' influence at three levels: the marketing specialist, firm, and market levels. At the marketing specialist level, the marketing specialists had influence over one another, drawing and consulting one another to plan, develop, launch and appraise their project. The firm level relates to the marketing specialists' influence they had with various non-marketing personnel at TBOB

and TBOP's stakeholders such as tourism operators and local government. The market level considers data of the marketing specialists' influence at the industry and marketplace level, which includes travel agent companies and the project's target market. In brief, this section describes and analyses the influence TBOP's marketing specialists had with each other and the project, its organisation, its target market and industry.

2.1.3.1 Influence at the marketing specialist level

The evidence collected describes how TBOP's marketing specialists influenced one another in relation to their marketing project. From the analysis, the marketing specialists influenced one another and the marketing project in four main ways. First, the robustness of the processes the marketing specialists used throughout the rebranding project was reported to be influential. Second, familiarity with TBOP's organisation and stakeholders, particularly the marketing manager's familiarity, influenced the project. Third, the marketing specialists' network of contractors and their accountability structure also influenced the project. Finally, the marketing specialists' natural talents and abilities played a significant role in their influence on one another and the project. In sum, it was what and who the marketing specialists knew that played a significant role in influencing the project.

As discussed earlier, the marketing specialists' processes were drawn from marketing theory, TBOP's objectives, a research-based understanding of the market, and results from testing various hypotheses upon the market. These and other matters played a role in influencing, or more specifically, shaping the rebranding project. The marketing manager explains the conversations marketing specialists would have with one another:

“Having this really solid brand framework and brand story and the consistent elements of the canvas. So, **once you can tick all those boxes** – is it delivering on the personality; so, does it feel right? Is it delivering to the target market? Does it meet our brand guidelines? Does it have those consistent elements and, at the end of the day, **does it communicate what you want it to communicate?**” (C1:P3)

As described, the marketing project's design is created and appraised by the marketing specialists' knowledge of marketing principles and procedures. In this case, the main marketing tool used, as advised by their marketing consultant, was the Brand Roadmap, along with the marketing manager's familiarity with TBOP's context. In this case, the context includes information on TBOP's organisation, objectives and its target market.

However, the processes that marketing specialists employed to ascertain robustness were not limited to selecting the correct procedure for a specific context alone. Also needed was the testing processes that generated context-related recommendations that either supported or negated the hypotheses generated at each step of the Brand Roadmap. The marketing agent puts it this way:

“Just robustly test it as much as you can but **then you have good faith that you know that you’ve got a plan**, that's a long-term plan and you know the steps that you need to take, map those all out and work those out into a plan... we've robustly tested it.”
(C1:P2)

By initiating the Brand Roadmap, and, where possible, researching and testing the results at each step, the marketing specialists were influential at the marketing specialist level. As stated, this influence was due to the confidence that their procedures were correct, they understood their firm’s context, and after testing their ideas, their findings were robust.

A main area in which TBOP’s marketing specialists’ knowledge influenced both the project and one another was their familiarity with TBOP and its stakeholders. In this area, the various marketing specialists involved often deferred to the marketing manager who was more informed and connected to the organisation. In the interview, participants were asked about why their organisation employed a marketing specialist, as opposed to only contracting marketing consultants if and when needed. The CEO provided the following answer:

“We know that at certain stages the advantage of having [our marketing manager] involved is **the level of intimacy** [they have] with the organisation to carry on the same path and distil its needs going forwards. That’s the advantage of having [a marketing manager] over a consultancy. A far **more intimate understanding of what we do.**”
(C1:P4)

As shown, there were ‘certain stages’ during the rebranding project where the marketing manager’s familiarity with TBOP was an asset that their marketing consultants lacked. Areas of TBOP’s organisation may have included knowledge of their personnel, stakeholders, objectives, branding, funding avenues, as well as the tourism industry and competing RTOs. Therefore, having the marketing manager interacting and overseeing the contractors’ marketing work provided the CEO assurances that the project would progress soundly. In this arrangement, the marketing consultant would defer to the marketing managers more intimate knowledge of TBOP’s organisation and branding. However, the CEO would not dismiss the value of other marketing specialists such as the marketing research and branding consultants that were contracted. When it came to marketing, the CEO was aware that the perspective of TBOP employees alone might lead to stagnation, whereas the perspective of external marketing consultants would provide more objective perspectives. One of the marketing agents addressed this issue by describing their role as a ‘safety barrier’ when developing ideas for a marketing project:

“So, any organisation if they were just to go from Board to Chief Executive and... then they go straight to the consumer, they're upping their risks... I think the more **safety barriers you can put between yourself and your consumer to make sure you’ve got it right for them.**” (C1:P2)

Therefore, having an external marketing consultant alongside the marketing manager, provided the CEO more confidence in the development process of the marketing project. Here, the CEO

believed the knowledge and perspectives of both an internal and external marketing specialist influencing one another helped overcome inherent deficiencies each party may have had. For instance, the marketing manager's familiarity with TBOP and its culture may hinder their perception for change. Likewise, the marketing consultant's unfamiliarity with TBOP may have caused them to propose ideas that were inappropriate for the organisation. In this case, the CEO recognised the benefits of having the influence of both the marketing manager and the marketing consultants shaping TBOP's rebranding project.

Apart from their influence in using and testing marketing procedures, another influence the marketing specialists had on the marketing project was their selection of contractors, cast, and locations. These choices influenced the look and feel of marketing collateral and required some specialist skills. One marketing specialist was inexperienced with TVCs which resulted in the marketing manager having to return intermittently from leave to assist them. However, as the CEO explains, while the marketing manager had freedom, they were still accountable to the CEO for their choices:

“The talent, what it should look like, who should do it, who the filmmaker should be. Going through that whole process together **led by [my marketing manager]**, confirmed by myself. For me **I give a very long rope for [my marketing manager] to go and do [their] thing.**” (C1:P4)

As described, providing the marketing manager the leadership or point position in aspects of the marketing project is another form of influence they had at the marketing specialist level. Here, the CEO, while providing oversight, allowed the leadership role to go to the marketing manager. Therefore, the marketing manager is provided creative and operational freedom although they are obliged to be accountable to the CEO.

With regards to how the research question regarding marketing specialists' knowledge influenced the marketing department, TBOP does not have a marketing department. Rather, TBOP's marketing manager was in sole charge of marketing and communications, whereas the rest of the organisation was made up of other roles including CEO, ICT, and administration. However, the organisation considered itself a marketing firm, charged with marketing the Bay of Plenty. Despite not having a marketing department, comments from the marketing specialists relating to how they influenced or were influenced by other marketing specialists in this and previous roles are worth discussing. Mentioned already were the influential marketing mentors who trained TBOP's marketing manager in various marketing disciplines. As a reminder, these disciplines included scientific marketing, research, communications, systems development, agency briefs, marketing strategy, and account management. The marketing manager summarises the importance of being mentored by her marketing bosses and laments the decline of mentoring in organisations:

“I was taught very well strategically I think, and I had some excellent bosses within organisations... **I think that mentoring of marketers is being lost** within organisations.” (C1:P3)

Despite not having a marketing department, there was evidence that the marketing specialists influenced one another during the project. For example, a marketing consultant describes their interaction:

“There was **at least daily communication between the teams** if not every second day. Formally would be probably a weekly WIP of the work that's in progress... also layered over that there would be pertinent times we would have strategic conversations... **but it can be at different levels**, sometimes it can be quite tactical, you know, we need a half page ad to go in the Jason's magazine.” (C1:P2)

As well as discussing their influence in general terms, the marketing specialists would typically influence or defer to the other based on one another's data, perspective, or expertise. For instance, the marketing agent would defer to the marketing manager perspective relating to TBOP's branding due to having a greater familiarity with it. In the following example, the marketing agent explains how they might influence a firm's marketing department:

“So, part of our role as the external advisor is to bring an **outside perspective** and sometimes bring in **different ideas**.” (C1:P2)

As shown, a marketing consultant's perspective as well as their subject-matter expertise played the influential role at the marketing specialist level. Results of the market research conducted by another marketing specialist also played an influential role at the marketing specialist level. In contrast, a lack of expertise resulted in a lack of influence for one marketing specialist. For instance, the marketing consultant who was hired during the marketing manager's leave of absence was inexperienced in making television commercials. As the marketing consultant explains:

“I hadn't made a TVC before, so it was new ground for me... but **I was surrounded by people who had done this many times**. So, in some areas where I wasn't as comfortable, **I probably didn't push back as much as I could have** in terms of what I felt would connect more with an audience.” (C1:P5)

Here, the marketing consultant described how their lack of expertise in film production resulted in them dismissing their own ideas for the TVC. In other words, despite being an experienced marketer, the consultant was not confident in introducing changes they felt the TVC required in order to resonate with the audience. Under the surface, it seems that the latent influence residing within the film production specialists may have unintentionally squashed the marketing consultant's confidence in sharing her perspective on the TVC. This finding suggests that although a marketing specialist might defer to the subject-matter expertise of the other, they should still feel obligated to share their perspective on their project's settings.

Hence, the influence the marketing specialists had on one another was often based on their area of expertise, their external or internal perspective of TBOP, and their research data. As discussed, their past experiences, mentoring, and education played a major role in the project's development and in influencing other stakeholders. However, when the marketing consultant concedes that 'I hadn't made a TVC before, so it was new ground for me' their influence in that area of the project gave way. In this instance, other experts or, 'people who had done this many times' assumed a more influential role, leaving the marketing specialists uncomfortable in asserting themselves. As shown, past experience and expertise in a particular area, for example one's marketing pedigree or TVC experience, was a latent influential force. Here, past experience converts into leverage which strongly influences decisions about the project at hand. In the examples shown, participants who were less expert at a particular topic, whether TBOP's branding, TVCs, or the Brand Roadmap processes, were obligated to cede their points of view. However, those who were proven subject-matter experts in past endeavours appeared to have the most influence, within their subject, afforded to them. In the CEO's case, he happily provided his marketing manager 'a very long rope', whereas the marketing consultant reluctantly withheld 'push back' on decisions the director made regarding the TVC. Hence, expertise, or perhaps the perception of expertise, carries either a persuasive or coercive influence which others might either depend upon or become beleaguered by. Either way, the marketing project is shaped accordingly.

2.1.3.2 Influence at the firm level

Following on from their influence at the marketing specialist level, the study also investigated how marketing specialists were influential at the firm level. The firm level refers to various non-marketing personnel throughout TBOPs organisation, including board members, as well as TBOP's stakeholders such as tourism operators and local government. Although determined at the marketing specialist level, the project's settings were subject to change during the project's adoption at the firm level. As the CEO describes, the marketing specialists' influence, particularly the marketing manager's, strove to increase their stakeholder's commitment to the project:

“Reporting to our stakeholders... How we're gonna get that **sell-in with operators from a tourism forum when we're getting them altogether, **all the way through to the governing bodies** together.” (C1:P4)**

As shown, the marketing manager was responsible for pitching the project across the various stakeholders within and external to the firm in order to garner their commitment. As the CEO explains, the marketing manager was particularly focussed on influencing stakeholders this way:

“[Our marketing manager's] pre-emptive understanding about order is about saying first **'we must have stakeholder engagement** before we can go ahead and do

this to be successful'. Another very strong skill of [our marketing manager] is to be able to say, '**we need to present this appropriately.**'" (C1:P4)

Here, the marketing manager influenced the CEO by recommending the engagement-with-stakeholder approach described above, which has gone on to influence the various stakeholders. The marketing manager describes the outcome and benefits of this inclusive approach:

"We've got much better engagement with [tourism operators] now, so we meet with them at least quarterly and take them through what we're doing and why we're doing it and then we show them the results. So, **we were much more engaged as a trade organisation.** They get to come in and share their opinions with us and we go out and meet with them and we're actively looking for ways that we can help boost their businesses whilst **being very clear about what we do versus what they should do.**" (C1:P3)

In terms of being influential, the marketing manager describes the engagement process as bilateral and ongoing, with the marketing manager being the instigator and chair of the meetings. At the meetings, the marketing manager presents their marketing plans, reports on their progress, and provides clarity around the appropriate roles of each party. For instance, despite tourism operators wanting their business promoted, the marketing manager insists that TBOP's role is to market the whole region rather than its specific sites. Furthermore, the marketing manager discussed using reports from the Dashboard computer program described earlier to manage or influence the stakeholders' perceptions of TBOP:

"Our team has built a dashboard, so we can read it much more easily... We're tracking [data such as bed nights] over time, much better usage of what information we have got, which again **is giving us more influence with everyone**, for council and the board and the trade, we can tell everyone how we're performing which is therefore **building this perception of competency generally.**" (C1:P3)

As shown, TBOP's marketing manager was not influential with frontline staff only. Rather, the marketing manager influenced every level of personnel as well as board members, as well as governmental and trade-based stakeholders at regional and national levels throughout the project. This point is interesting as TBOP's marketing manager operated from a middle management position. However, as the board member explains, they had planned on hiring a marketing manager who would prove to be a positive influence on TBOP's culture, prior to their appointment.

"We decided as a board that we wanted to get the skills to then grow the total capability and capacity of the team as well. Because **if you have great people... everyone increases and raises their skills.** The expectation, their opportunity, the output, the quality, the delivery. So, it was about going, how can we become a better organisation? How can we support also to great positive change in the culture?... So, it was all about part and parcel of becoming a better organisation and doing a better job." (C1:P1)

Described here is the board's desire to seek an appointment that would create opportunities and raise and support TBOP's collective skills, capabilities, and outputs. Although not shown above,

the board member also indicated that the appointee would need to compliment the CEO's vision and drive to see the region being promoted successfully. These criteria are perhaps summed up by TBOP's marketing manager who sees the role as being a driver of growth:

“The marketer in a firm, I think, needs to be **the driver of growth** – that's my opinion... And to do that they have to have **a really solid understanding of the strategic framework of the company** – where are we going, why are we here, what do we do, what are we going to achieve, what can we possibly achieve and how can we possibly achieve that? So, what things do we need to do in order to achieve growth?” (C1:P3)

While the above has described the *who* and *what* the marketing manager has influenced in and around the firm, it also begins to discuss *how* they are influential. With an intimate understanding of the firm, its vision, strategic, tactical, and operational framework, the marketing manager is able to build a convincing case for developing a marketing project. Building upon this understanding, the marketing manager was able to make informed marketing decisions that are likely to stimulate growth for TBOP. The CEO provides some further insight:

“**[Our marketing manager's] conceptional reasoning**, the superior part of that is [their] understanding the bigger picture and the skills [the marketing manager] brings. The ability to stop and consciously back up and see the organisation for all its facets, the direction it's going. Is [TBOP] on path? **It's that innate ability to be able to stop, step back, quantify and move forward, is [the marketing manager's] skill set.** [The marketing manager's] **roundedness.**” (C1:P4)

Therefore, as well as being able to analyse TBOP's and presumably the market's position, the marketing manager was able to determine how to 'move forward'. The CEO's term 'roundness' suggests a summary of their marketing manager's ability and influence, capturing both their skills and ability to generate forward and focused momentum for TBOP. The CEO goes on to provide further information on how their marketing manager achieved this:

“The way [our marketing manager] **gets it done is through... diplomacy and... delivery and... understanding.** [Our marketing manager is] not an emotional person... doesn't let emotion get in the way of... decision-making. That's largely a marketing, but also a natural talent.... [Our marketing manager] will develop a plan but make sure... [you are taken on] the journey, so then **it's not objectionable.**” (C1:P4)

As stated earlier, although the marketing manager resides in their middle management tier, they were highly effective in moving TBOP toward its ideal culture and outcomes. As the CEO intimates, rather than referent power, the marketing manager uses people skills, some naturally acquired, and an expert perspective to effect change throughout the organisation. The people skills involved included diplomacy, making informed and appropriately couched recommendations, and having answers. One facet the CEO addressed is their marketing manager's emotional stability and steady focus on the objectives of the firm rather than the intentions and agenda of any particular stakeholders. Because the project ideas came from sound marketing procedures, the marketing manager overcame objections from anyone who

were unable to sufficiently justify the changes or ideas they tabled. This strategy helped mitigate ongoing arbitrations with stakeholders which may have hindered the project's momentum. In sum, the marketing specialist, particularly the marketing manager, was influential with TBOP's various non-marketing personnel as well as its board members and stakeholders. The marketing manager's influence was due to their focus on growth, and engagement and management of stakeholders at all levels with an informed strategy and effective people skills.

To interpret the findings further, the marketing specialists' knowledge influenced TBOP and its stakeholders in several ways. First, as described by the board member, having a marketing specialist helps 'grow the total capability and capacity of the team... everyone increases and raises their skills'. In other words, the marketing specialists' knowledge, when shared or demonstrated, has a leavening effect on the marketing skills of non-marketing roles across TBOP. The effect caused the firm as a whole to move closer toward its business aims with a marketing mindset. Second, the marketing manager saw their role primarily as being 'a driver of growth'. The comment suggests she saw her role as directive, rather than passive, and imposing an agenda of growth upon TBOP rather than conform to the firm's legacies. Third, her ability to have TBOP 'move forward' was attributed to her expertise and familiarity with TBOP, and particularly her leadership capabilities or diplomacy. Also, the marketing manager's 'ability to stop and consciously back up and see the organisation for all its facets' indicates an atypical perspective of the firm. Identified by the CEO, this perspective indicates a meta-viewpoint of the organisation, plus 'that innate ability to be able to stop, step back, quantify and move forward'. In this case, both the marketing manager's concept and analyses of the firm, and her ability to respond to this knowledge navigated TBOP toward growth. In sum, the marketing specialist utilised their knowledge of TBOP, marketing, and leadership to direct the firm toward fulfilling its objectives.

2.1.3.3 Influence at the market level

As well as the marketing specialist and firm level, the marketing specialists' knowledge was influential in the marketplace. TBOP's marketplace includes the New Zealand tourism industry's trade and governmental organisations as well as TBOP's target market. The marketing specialists' influence needed to extend to each of these areas for several reasons. First, the Rena disaster had been broadcast globally, affecting the perceptions of the Bay of Plenty as a destination not only with tourists, but with the tourism industry globally. The tourism industry stakeholders discussed in the interviews included: Tourism New Zealand, TRENZ (aka Tourism Rendezvous New Zealand), Student Travel, the Virtuoso Group out of Australia, and Regional Tourism Operators in other centres. With some of these stakeholders in mind, the board member explains some of the fallout from the Rena disaster:

“There would still be wholesalers or frontline travel staff in Australia who would go, 'And what's the beach like now?' So, anything that hits global media and particularly

because of digital now, it gets out so far and wide that **unless there is a constant and consistent stream of corrective communication, then first impression or the hysteries will persist**. So that is absolutely critical about the need to do something.” (C1:P1)

Having recognised that the damage to the region would persist in people’s minds unless there was a counter campaign, the board member strongly advocated the rebranding project. In addition, the CEO provided more reasons to develop and launch the campaign:

“There were several reasons to do it. One, to show the depth of the region. Two, to confirm in the minds of the regulars that we’re back on track, we haven’t got the disaster happening on our doorstep any more. We’re out there confidently marketing ourselves, **therefore we must be fine**. Also, to **convert active considerers**, people who actively are considering to come down here and push them along that line to say, ‘Actually, we will go down there now’. It was **legitimising who we were as a destination**.” (C1:P4)

Along with the board member’s concern with the tourism industry, the CEO’s concern was to show or remind the target market the variety of experiences the Bay of Plenty offered. Moreover, the CEO’s other point was to tell the target market that the region had confidently reopened. According to the marketing manager, their main target markets reside in the Auckland and Waikato regions. Overall, the main reason for the campaign was to manage the industry’s and public’s perceptions post-Rena, in terms of providing confidence to all parties in the region’s offering.

To discuss how the marketing specialists were influential on the market, three main factors from the project emerged: the project’s purpose, its messaging, and its timing. In a general sense the project’s purpose was to announce that the region had re-opened for business. However, in a marketing sense, the marketing specialists had more specific purpose in mind. The marketing agent describes the purpose for the rebranding project from a marketing perspective:

“It’s about **how to enact change**. So how we can change consumer behaviour or how do we have to change our business’s behaviour to match what consumers need or to optimise our profitability? (C1:P2)

Similarly, the board member had the following to say:”

“We’re all about changing people’s behaviour **so we needed to change**, we measured the perception of the Bay of Plenty and we needed to change the Bay of Plenty’s perception as a holiday destination, so how do we change that? How do we create engaging communication?” (C1:P1)

Essentially, the marketing specialists were investing their knowledge into a project designed to influence the behaviour of TBOP’s target market. While tourists had previously stayed away from the area for reasons such as oil pollution on the beaches, one of the campaign’s objectives was to attract those people back. As the marketing agent explains next, in order to attract visitors back to the region, they worked on developing an influential campaign:

“We **can't have weak messages**. We have to have really strong messages that are going to be really engaging to our consumers... how do we mirror what we know is going to be engaging to a consumer and make tourism in the Bay of Plenty relevant to our consumers?” (C1:P2)

By working on how to make their messaging of the campaign effective, the marketing agent asks how they might ‘mirror’ what makes the region attractive to people in the first place. By instigating the Brand Roadmap process, the findings established that the Bay of Plenty was attractive to visitors because of its laidback/sophistication. By understanding an authentic driver behind the average visitor’s motivation to come to the region, the marketing specialists were able to develop an influential message: The CEO puts it this way:

“I think [our marketing manager’s] skill and everybody who worked with us was that we continually asked ourselves were we being true to what our visitor likes about our place. I think what [**our marketing manager**] **is very skilled at doing is taking it back to the truth, or taking it always back to the end user**, understanding them, and not letting it be distracted between our wants but always taking it back to the baseline of what the consumer wants.” (C1:P4)

Therefore, by undertaking a process that uncovered an authentic yet intrinsic motive for coming to the region, the marketing specialists had the basis of an influential message. Furthermore, as the CEO explains, the timing of the message also played a strategic role:

“We purposely set it to suit our market. We did a November release, so that was **targeting people that were going to be coming here for holidays**, or planning to come here for holidays, long-term holidays.” (C1:P4)

Confident they had developed the correct message and promotional material, the marketing specialists were also concerned about maximising the influence of their campaign by releasing it at the right time. Specifically, to maximise the impact of the campaign it had to be broadcast at a time when the target market was already thinking about their holiday plans. Therefore, the marketing specialists’ influence on the market was based on clarifying the purpose of the campaign, the efficacy of its message, and timing.

Having earlier discussed how TBOP’s campaign was appraised, participants were also asked how they felt the campaign impacted the market. Their responses provided another perspective on how the campaign, and the marketing specialist’s influence, was appraised. For instance, tourism operators who attended the focus group had mixed feelings about the project’s success:

“I would say that **the current campaign is probably the most professional** that's been out there in the market for a while.” (C1:P6)

“If you compare it to something like the Rotorua campaign which you might have seen on television... it shows you the culture, she's talking about the place like she belongs to it. This [**TBOP’s campaign**] **is just benign** and not only that it’s not linked to anything else.” (C1:P7)

As shown, the tourism operators felt that while the campaign had a polished look and feel, it had an inferior impact compared to a neighbouring region's recent campaign. Also, the tourism operators were disappointed that specific and popular tourism sites, such as their own, were not clearly identified. The tourism operators also commented on the lack of signage and other marketing collateral within the region which would have complimented the campaign. However, other participants who were interviewed reported that the campaign had a positive effect on the regions' operator, public, and other influential governing bodies. For instance, due to the professionalism of the campaign, the board member suggested that the CEO and marketing manager had greater access to Tourism New Zealand (TNZ):

“What [having this launched this campaign] also does is, in the end, we rely heavily on the actions of Tourism New Zealand. **If Tourism New Zealand have confidence that Tourism Bay of Plenty** have the skills and the ability and capacity to liaise with them in a way that is exceptional around customer - that interaction, that someone who is commercially-minded, who gets it and you're operating at that level, then again, that opens a door doesn't it?” (C1:P4)

TNZ is the agency responsible for promoting New Zealand tourism internationally (Tourism New Zealand, 2019). To understand what access to TNZ means, the board member provides the following explanation:

“[An open door] benefits by **ensuring that we are always at the table**. So, when Tourism New Zealand is considering something, we are able to provide a response that ensures for as much as we can, that we are part of that promotional communication. That we are providing the right information to them at the right time. That we are able to assess the opportunity and go, actually I can spin it this way, we need to be part of that. Or being able to create opportunities to take to Tourism New Zealand and in a way that we know what their commercial or metric triggers are. **Because Tourism New Zealand are very clear, they're input-output outcomes**. You've gotta be in that part. So, **we are always looking at opportunities that we can proactively take to them.**” (C1:P1)

The board member suggests that an improved access TNZ could be leveraged further into providing TBOP higher consideration, visibility, and involvement in future national and international marketing campaigns. This benefit is due to TBOP demonstrating its understanding of its customers and stakeholders, the importance of measuring the outcomes of their campaigns, and its flexibility in modifying the campaign. For example, the region hosted an episode of reality television show, *The Bachelor* in 2015. TBOP leveraged from the event by exchanging its 'Plenty for Everyone' tagline with 'Plenty to Love', producing a television commercial and website as well. In sum, TBOP gained further access to Tourism New Zealand's table having demonstrated themselves as being a professional outfit. Overall, the marketing specialists were able to influence their marketplace due to the clarity of project's purpose, the authenticity of its messaging, and its strategic timing.

In considering how the marketing specialists' knowledge influenced the market, several overarching themes emerged. First, the marketing specialists utilised their marketing expertise,

market intelligence, and life experiences in launching promotional material designed to attract people to the Bay of Plenty. In TBOP's case, the brand essence 'laidback/sophistication', whose theme majorly influenced the promotional material launched in the market, was developed using marketing tools such as the Brand Roadmap. Market intelligence also played a role in validating the brand essence, as opposed to shaping it, and aspects of the marketing specialists' life experiences also fostered the promotional material. Of interest in this case, was the lack of the market intelligence sought to develop the brand essence. Here, the marketing specialists used the Brand Roadmap because they wanted to understand the Bay's point of difference with other regions rather than their audience's perspectives of the area's attractions. Presumably, the marketing specialists had already anticipated the most likely responses to survey questions regarding the region. Therefore, in terms of influencing the marketplace, the marketing specialists imposed their findings, i.e., laidback/sophistication, rather than reflected the target audiences' responses to what attracted them to the region.

2.1.3.4 TBOP's marketing specialists' influence

Overall, the study identified three main ways in which the marketing specialists were influential, i.e., being given responsibility for the project, by undertaking robust marketing processes, and by being tactful. First, the urgency to reopen the Bay of Plenty region after its prolonged shutdown assisted the marketing specialists' influence. Specifically, TBOP, the local council, tourism operators, and other stakeholders each desired to reinstate the region as a tourism destination and the marketing manager was appointed to lead the project. Furthermore, there was a substantial budget allocated to TBOP to assist in the rebranding project, therefore stakeholders expected that an effective and professional promotional campaign would be the result. Next, with the stakeholder objectives, expectations, and budget established, the marketing specialists were briefed, and the marketing project came under the marketing specialists' sphere of influence.

From this point, the marketing specialists' influence was also reinforced in the stakeholder's minds by the robust marketing processes they undertook. The process included collecting knowledge and material from subject matter, marketing, and creative experts and taking a consultative position with the various stakeholders and personnel of TBOP. Also, by employing the Brand Roadmap, and then verifying its findings with the target market, the marketing specialists built a compelling branding case. For example, one tourism operator expressed his cynicism about how marketing specialists generate taglines and promotional material. However, the tourism operator also admitted the TBOP's new brand tagline was suitable and that he could not think of an alternative. Hence, the cynical tourism operator acquiesced to the marketing specialists' ideas due to the supporting processes undergirding the proposed tagline. This finding strongly suggests that although marketing outputs undergo robust processes, they may never achieve a unanimous consensus. However, these outputs need to be developed by

specialists using robust processes to overcome the cynicism, discord, or opposition raised by others. As discussed, the tagline ‘Your Place to Shine’ was proposed by the CEO but was eventually dismissed as it did not align with the Brand Roadmap’s findings. In other words, while an organisational culture of market orientation is beneficial, specialist marketing staff are still needed to complete marketing projects. As shown, marketing specialists were needed due to the time and expertise required to scrutinise, research, brainstorm, test, and refine, in order to plan, develop, launch, and appraise their marketing project. In this way, the marketing specialists’ latent influence transformed into leveraging influence they used to set and preserve the rebranding’s settings despite the inputs and arguments of other stakeholders.

As well as the various and specialist skills involved, the evidence suggests that the marketing specialists’ diplomatic engagement with stakeholders, particularly the marketing manager’s, complemented their influence. Here, rather than use her own views to argue with those of stakeholders, the marketing specialist would justify her position with evidence like the market’s voice or other research findings. In this way, navigating or dismissing the views and opinions of others was not undertaken at a personal level, but at a procedural level. In one example, a marketing specialist felt she lacked expertise in TVC productions, therefore her objections would sound like a personal view than the product of research and expertise. Therefore, she felt as though she could not assert her perspective upon the veteran TV production team. Despite this occurrence, the marketing specialists were generally able to maintain influence over the project’s outcome due to their level of expertise and the robust processes they had undertaken.

Therefore, the marketing specialists influence was due to three main factors. First, due to their marketing specialist knowledge and experience, their influence was initially generated or bequeathed by the major stakeholders of the project. From this point, the marketing specialists’ influence was further advanced by the robust processes they undertook. Similar to service marketing, processes such as the Brand Roadmap process make the service that marketing specialists provide appear more tangible and accessible. Finally, the marketing specialists used diplomacy when engaging with stakeholders whose views either opposed or at least demanded consideration. By leveraging dissenters with the due processes, research findings, or evidence that undergirded their project’s outputs, the marketing specialists were able to maintain their influence over the project’s settings.

2.1.4 Summary of the Tourism Bay of Plenty Case

Overall, the marketing knowledge demonstrated in TBOP concurs with the findings of marketing specialist knowledge domains found in the marketing and management literature. To restate, these knowledge domains were marketing expertise, organisation familiarity, market intelligence, leadership, and life experiences. Each of these knowledge domains played an important role during TBOP’s rebranding project, depending on the level the marketing specialists were operating in. As discussed, the marketing specialist level was influenced

primarily by the marketing specialists' expertise, as well as their organisation familiarity. At the firm level, TBOP was primarily influenced again by the marketing specialists' expertise, familiarity with TBOP, and leadership skills. Finally, the marketing specialists primarily used their marketing expertise, market intelligence, and life experiences to be influential at the market level. In sum, specific attributes of the knowledge used by the marketing specialists when planning, developing, implementing, and appraising TBOP's rebrand, jointly and severally influenced the marketing specialists, TBOP, and its market. Moreover, the marketing specialists were influential due to their appointment to the project, the processes they used, and the diplomacy they demonstrated when consulting with stakeholders.

2.2 Zespri

2.2.1 List of evidentiary sources

In Zespri's case, one-on-one interviews were conducted with two marketing managers, two project managers, and an external marketing consultant. These interviews were audio recorded and averaged 75 minutes each. Once transcribed and checked, the transcripts averaged around 23 A4 pages each. The focus group consisted of three kiwifruit orchardists in the Bay of Plenty, whose audio recording was 118 minutes long, creating a transcript of 51 A4 pages. The marketing manager's reflective journal, minus the questions, totalled 526 words.

The documents and artefacts collected regarding Zespri's marketing project are as follows: Zespri's digital artefacts consist of the 19-page 2015 Zespri Taste Review: Industry Consultation Paper; a pdf version of the Taste Review Roadshow presentation slides; and digital file of Zespri's roadshow itinerary. Physical artefacts consist of the Grower Payments brochure and a hardcopy consisting of 66 slides which present Zespri's 2015 marketing overview. The interview and focus group transcripts, the marketing manager's reflective journal, and the marketing artefacts were examined for evidence relating to the research questions about marketing specialist knowledge and influence. Therefore, the following section addresses the research question RQ1: How was marketing specialists' knowledge used when planning, developing, implementing, and appraising the marketing project.

2.2.2 RQ1: The marketing specialists' knowledge

Zespri's Taste Review drew from the specialist knowledge of several marketing specialist sources. Specifically, as well as Zespri's multi-tiered global marketing team, marketing specialists from a market research agency also worked on the project. The primary marketing manager over the Taste Review Project had worked with Zespri for nine years, with seven and a half years as their communications manager before moving to the global marketing team. The marketing manager holds a graduate degree in public relations and communications. As the marketing manager explains, their knowledge and experience within Zespri before becoming a marketing manager was essential in securing the marketing role:

“The project management skills from that former role were transferable into this strategic marketing role, that is very much about building strong relationships, having a deep understanding of the business, developing technical knowledge in areas like taste and boosting our knowledge as an organisation and then helping translate for different stakeholder groups.” (C2:P1)

Therefore, understanding the various skills, internal and external networks, technical aspects, and Zespri's growth agenda guided the marketing manager throughout the Taste Review. These understandings took time to acquire, and the marketing manager attributes their role as a communications manager as a key contributor. For example, knowledge of technical aspects

such as fruit physiology was developed by spending time with both growers and scientific experts as a communications manager. This experience was useful when coordinating the project's research inputs, managing the research process, and assembling 'a deep picture' across Zespri's major markets. In brief, prior communications projects undergirded the marketing manager's knowledge when managing the Taste Review project.

However, other marketing specialists gained their knowledge in other ways. One marketing specialist was previously a grower and has served over a decade for Zespri as a Liaison Manager. As the Taste Review was an internal marketing project, the liaison manager's role bridged communication gaps between Zespri and growers. Having an orchardist's perspective was considered vital during the project, particularly while anticipating and addressing growers' concerns when discussing Zespri's strategic plans. Another marketing specialist's role was called the Special Projects Manager. This role resided under Zespri's Grower and Government Relations area and served to pull together resources between Zespri and the wider industry. One of the special projects manager's roles during the Taste Review was presenting at the various roadshows Zespri held around New Zealand. Here, they required not only an intimate understanding of Zespri's strategy, the market research findings, and the Taste Review's recommendations, but knowledge of where grower scepticism lay. Addressing the hot points of grower concerns with sophisticated and informed replies assisted the special projects manager in developing the confidence of growers during the Taste Review project.

Another marketing specialist, specifically a Research Specialist from an external marketing research agency, helped develop and conduct the Taste Review's sensory research in five countries. The researcher specialist had earned a master's degree in Statistics and Economics 12 years prior to the Review. Also, they had developed the project's methodology along with a university professor and another organisation called Plant and Food Research. The research specialist had also worked prior with Zespri on sensory research conducted in two countries in 2004 and indicated that both their companies had a very close relationship. Another marketing manager, whose title was Global Marketing Manager, had worked with Zespri for around 15 years and had a double-degree in Marketing and Agribusiness. The global marketing manager interviewed had also worked on the grower side of the business and with the innovation science team.

Concerning marketing specialist knowledge and the Zespri's Taste Review project which aims to change the growing behaviour of around 2,700 kiwifruit orchardists, the global marketing manager asserts:

“You can’t even have one person stepping in and working it out. You’ve got to have a team that are bringing in information from the different corners from the grower-base, from the market, consumer, customers, the science.” (C2:P2)

In other words, their background with Zespri had informed marketing specialists of the leverage needed to institute the grower behavioural changes required to produce sweeter fruit. Here, the marketing team knew that grower confidence and support in the project would demand a comprehensive body of evidence, technical support, and financial incentives.

To sum up, the project's marketing specialists were selected due to their diverse and complementary marketing expertise, organisation familiarity, market intelligence, leadership skills and life experiences. Here, the marketing manager's project management and communications experience were used to amalgamate the marketing, technical, sociological, organisational, logistical, industrial, and academic skills needed to complete this project.

2.2.2.1 Planning the marketing project

Concerned with their premium market position, Zespri's CEO reminded his Board that consumer liking research had not been undertaken for almost a decade. Hence the 2012 Taste Review project was initiated. Having completed a similar project capturing sensory data and developing a grower payment scheme based on taste indicators in 2004, the 2012 Taste Review already had some planning precedence. The project manifested in two main phases. First, the research phase conducted consumer liking research of Zespri's green and gold kiwifruit from five of their largest international markets. As the research showed that Zespri's minimum taste standard was too low, the second phase launched an internal marketing campaign designed to convince growers to accept an amended payment scheme. The amended scheme raised the bar regarding the taste levels Zespri would accept from growers and the payments the growers would receive. Using this two-pronged approach, namely market-facing and grower-facing phases, Zespri's commercial objective was to maintain its position as the world's premium kiwifruit brand.

Zespri's marketing specialists were the project's primary planners. Charged with determining their major markets' preferences and adjusting their product's standards to suit, the marketing specialists understood the robustness of the planning process governed the likelihood of success. The special projects manager put it simply:

“The **process** is as important as the final setting.” (C2:P3)

Despite the apparent commercial savvy to determine and match the market's preferences, the marketing specialists knew that imposing a change of standards would provoke scrutiny from stakeholders. Therefore, the marketing specialists appropriated expertise from both within Zespri and from external sources to ensure a reliable process was developed. For instance, the marketing manager contracted a third-party marketing research agency, who in turn consulted other specialist organisations to develop a reliable methodology and questionnaire.

“What I’ve found so fantastic about our research partners and the marketing spaces, is **really getting to the heart, prior to conducting the research**, of what questions do we need to answer? **Not what outcome are we trying to prove.**” (C2:P1)

The marketing manager above provides an example of how contracting a third-party market research agency adds credibility to the research phase due to their perceived non-partisanship. Also, apart from involving an independent research agency, the marketing manager is clear that Zespri’s motives and agenda are market driven. In terms of conducting the research, the research specialist provides a concise account of the planning discussions and the thinking behind their method and logistics:

“Fifty percent of the time is spent talking or discussing what we need to do, when it's done, how it's done, where's it done, which facilities we need, how to get the fruit that we need [in the testing booths] in time, what type of fruit we need from which orchard, which dry matter bands, what size. **There's a number of components that come in play**, then we, there's a lot of time spent discussing it between us: Plant & Food [Research], the key people at Plant and Food and Zespri, what the questionnaire should look like before we even get off the plane... So, there was a review of the models used in the past, and we then workshopped what we should do, for the updated version of project Taste. **Based on the review and any new knowledge that we have now, we then plan what to do.** So, we plan what we needed, where we needed to go and get it, which insights to gather where, and we work through the protocols and questionnaires to use. So, once it's all agreed and ready to go, what we need to do is go and do it.” (C2:P4)

Here, knowledge regarding the task, its components, and the logistics are shared between specialists from a variety of expert sources. These advisors include the agency's researchers, marketing and non-marketing representatives from Zespri, and industry stakeholders, each whom inform and evaluate the planning process.

During the grower-facing phase, Zespri's marketing specialists plan how to approach growers and present them the results of the market research. As one of Zespri's global managers, a veteran of the 2004 Taste Review project, puts it:

“You’re thinking... how have things moved on over the last ten years, where is grower sentiment at?... **You can’t just go and change the taste parameters... without having a pretty bloody good reason** to do it.” (C2:P2)

As shown, the global manager was ascertaining the current mood of orchardists to determine how Zespri might best approach them with the findings that recommend higher taste settings. Considering and planning how to lead growers toward improving their orchard management processes, particularly in the wake of the PSA infestation that many growers had suffered, was critical. In the planning phase, the objections to changes in the current taste settings and the associated payment scheme are carefully considered due to the backlash Zespri anticipated. One concern was that if enough growers revolted against the scheme, another kiwifruit marketing group might be set up, and Zespri would lose its single desk marketing status. Therefore, during

the planning, Zespri had to contemplate their position as both a premium brand in the marketplace and as a credible advocate in the eyes of its growers.

In sum, the Taste Review required the marketing specialist to plan in two phases, the market research phase and the internal marketing phase. In both phases, Zespri was mindful of how robust their processes were, whether in creating questionnaires, choosing collaborators or in approaching the growers with the market's preferred new settings. This mindfulness was due to the anticipated scrutiny the research's recommendations would receive by internal stakeholders, i.e., the orchardists. By planning both phases with external stakeholders, the marketing specialists aimed to reduce levels of bias, poor methodology, and relational strain that might occur during Taste Review project. To plan these phases, the marketing specialists contributed from fields within knowledge domains identified in the literature review. In particular, the planning process drew from areas within marketing expertise and familiarity of Zespri and its stakeholders and shareholders. Notably, the marketing specialists and Zespri as a whole acknowledged their market intelligence was both too narrow and outdated, hence the first phase of market research. By drawing from the array of specialists and each of their fields of knowledge, the marketing specialists were able to plan their project with a broader lens. This wider lens, which combined findings and views regarding both their external and internal market, provided the necessary insights of their consumers and orchard growers respectively, to develop the project.

2.2.2.2 Developing the marketing project

As the planning was conducted in two phases, i.e., market or grower-facing, so also the Taste Review developed in this dual vein. Concerning the market-facing phase, the marketing specialists liaised with several internal and external experts and drew from their experience with similar research projects to develop the sensory research. These experts were typically from industry, stakeholder, academic, or marketing agencies. The research specialist provided some insight into those involved in the market research phase:

“This particular **project has been a collaboration** between Plant & Food Research and Zespri... We [the research agency] participate in this process. We involve, also some other specialists. There's a professor from Auckland University... [who] came along as a statistician. There were other specialists in Sensory within Plant & Food [Research] that were involved and quite a lot of people from Zespri.” (C2:P4)

Having gathered a broad team of relevant experts from within and external to Zespri, the marketing specialists began to develop the market research phase further. Here experts would provide their perspective on how the research should be conducted, even providing viewpoints not aligned with commercial interests of Zespri. For instance, Plant and Food Research's interests lay in the academic aspects of the project, which were sometimes at cross-purposes with Zespri's commercial objectives. However, Zespri accepted that the articles Plant and Food

Research would publish as a result of their participation would lend further credibility to the Taste Review during the grower-facing phase.

Similarly, concessions were made on both sides as the viewpoints of various stakeholders were validated or overruled. Once the scope, methodology and questionnaire had been settled, the marketing team began organising the physical assets required in the research phase, as the research specialist puts it:

“What we needed to have, to do, to rent, or to buy, to run the research with consumers in [the] market.” (C2:P4)

Therefore, the spaces, operational staff, equipment, and kiwifruit to run the market research were sort was well the protocol used to enlist participants. This phase required the marketing specialists to travel overseas to supervise and manage the development of the testing facilities in each of the five countries.

On the grower-facing side of the development phase, the marketing specialists knew that setting both the new minimum taste standard and the taste value curve or payment curve was critical. With setting the minimum taste standard, Zespri used findings from their sensory research to justify raising the threshold from previous years. This new approach meant that Zespri would buy from growers whose fruit reached or exceeded a higher minimum taste standard.

Participants in the research, including growers, suggested that most orchards, particularly in the Bay of Plenty region would typically exceed the minimum taste standard. However, they also acknowledged that the fruit from some other regions might struggle to reach the threshold. When setting the minimum taste standard, many considerations had to be made so that it would be accepted. For instance, the marketing specialists reckoned that setting the taste too high may cause an adverse reaction from some growers whose harvest or colleague’s harvest may be excluded from export.

Further, by excluding some growers, the likelihood of a second kiwifruit exporting company being set-up in New Zealand increased. Therefore, the marketing specialists were careful to develop a project that not only set a higher minimum taste standard but provided technical resources to growers everywhere to help them reach or exceed the threshold. The special projects manager puts it this way:

“It’s all part of **developing a really comprehensive understanding within the wider industry** of what the programme’s trying to achieve, what the consequences are, to build confidence in the programme, and then you get the outcome.” (C2:P3)

Regarding the payment curve, as mentioned the marketing specialists wanted to incentivise orchardists into growing sweeter fruit and reduce the export of marginally tasting fruit. Therefore, the payment scheme provided higher payments for sweeter fruit; as the special projects manager puts it:

“Our data suggest that we’re paying money for fruit dry matter at a level below what consumers actually like it. So, what we’re suggesting is that **we move the money more onto the higher tasting fruit.**” (C2:P3)

As shown, the marketing specialists evolved the payment scheme to reward growers who produced fruit which exceeded the minimum taste threshold. However, the incentives to grow sweeter fruit only reached a certain level. After a particular level of sweetness had been reached, the research showed that the fruit's desirability levelled off. Fortunately, paying growers between the minimum and maximum levels of sweetness deterred growers from exposing their trees to vulnerabilities in order to continue to increase their sweetness. Therefore, instituting a set bandwidth of incentive premiums proved judicious.

After the market sensory research and the settings of the taste and payment curves had been established, the marketing specialists set about developing the Taste Review roadshow. These roadshows, held in kiwifruit regions across New Zealand, are where Zespri’s spokespersons discussed topics regarding the kiwifruit industry with local growers. In particular, the 2105 roadshow was designed to discuss the findings from the market research and the new taste and payment settings. In preparing for the roadshow, the marketing specialists spent time anticipating the pain points that growers from around the country were likely to raise. Therefore, discussions involving expert growers, internal and external experts, and people with various thinking styles were held. As the special projects manager explains:

"We got a [200-page research report], a group of people sat down and summarised it all and then there was a group of four of us in the business who were tasked to **come up with some strawman proposals to achieve what we wanted to achieve.** And it was **my job to go out and talk to them and say this is what we think, let’s pressure test it within the business before we go out to the industry,** have we got it right? Have we got our settings right? Is this going to achieve what we want to achieve in the market? And they came back with their input.” (C2:P3)

Roadshows can be a risky setting to discuss the tightening of the quality and payment of an audience’s product. By using the strategies described above, the marketing specialists were able to develop and prepare strong arguments to present to growers. These strategies included creating strawman proposals and testing them both internally and externally at a small scale to anticipate grower pushback and develop responses. This process helped Zespri adequately prepare, as the Global Marketing manager puts it:

“Anticipating what some of those questions and challenge points are going to be and **making sure you are well armed to deal with those.**” (C2:P2)

In sum, the development of Zespri’s Taste Review revolved around three main areas. The first area was the market research phase where the marketing specialists involved expanded upon previous smaller scale sensory research projects to develop the 2012 Taste Review. Next, using the finding from the research, the marketing specialists developed the new taste and payment settings that Zespri planned to impose on its growers. The third phase, or the presentation phase,

was preparing for the Roadshow in which Zespri's spokespersons would present and discuss the Taste Review's research and recommendations to the growers. It was crucial to Zespri that each of these phases was developed robustly, that variables such as grower capabilities and market tastes could be aligned under Zespri's leadership.

In the development phase, the participants discussed areas of marketing specialist knowledge which lay under several knowledge domains outlined in the literature review. The fields of knowledge described were demonstrated by the marketing specialists involved and were crucial in providing Zespri with the confidence in launching the Taste Review project. Concerning market intelligence, the marketing specialists of that field worked on developing the necessary scope, method, questions, and physical assets. On the other hand, the marketing specialists used aspects of their organisation familiarity to recognise how crucial the settings for taste and payment methods were. Moreover, they also used aspects of their organisation familiarity to anticipate pain points that growers would have about the Taste Review and how they would address them. Aspects of leadership from the marketing specialists also came to the fore. Here, the marketing specialists sought to lead their shareholders, i.e., growers, from their legacy payment paradigm to the revised one. To assist in leading growers from one paradigm to another, the marketing specialists thought to use the markets' voice and appeal to the orchardists' business sense. Having planned and developed the Taste Review project, the next step was implementing it.

2.2.2.3 Implementing the marketing project

As with the planning and developing of the Taste review, the implementation of the project occurred in two main phases, i.e., the market and grower-facing phases. Concerning implementing the market-facing phase, marketing specialist knowledge came to the fore with managing the test sites and conducting the research. When managing the test sites in each of the five countries, the research specialist described some of the jobs and protocols their team would follow. Once they had arrived, they would check that the location of the research site to make sure it was the one they asked for and it had the required equipment and fruit supplies. Following this, they would meet with the scientists and prepare the fruit for the sensory research. The fruit was categorised by its dry matter bands, harvest, grower lines, and cultivars and the research team would discuss the strategies for testing on each day. Also, the research team would check that the participants in the research fit the predetermined criteria including age, gender, and frequency of kiwifruit consumption. The research specialist felt that their expertise in statistical analysis came in handy when managing the logistics and respondents, also adding that:

“[The sensory research] protocols [are] very complex. The preparation itself takes two hours for serving 12 people. Two hours of dealing only with fruit. Cutting and chopping and measuring and selecting. Five or six [researchers] for two hours for 12

respondents... It's ridiculous. It's a very well-studied kiwifruit. **And we are giving you sometimes a very bad experience, just because we want to.** We choose to give you very low dry matter fruit.” (C2:P4)

Having discussed the labour intensive and diverse aspects of the sensory research, the research specialist also described why they followed strict protocols. The main reason was an increase in confidence when it came time to analyse the data. Therefore, they felt that they needed to participate in the research themselves, ensuring every protocol was followed, including the right preparation, combination, and presentation of the fruit for each respondent. The steps that the research undertook in the sensory research were also necessary to produce robust findings. As discussed, these findings would go on to influence the taste and payment curves, as well as contribute to peer-reviewed academic articles, and were therefore answerable to an array of scrutineers. As a sense of accountability to Zespri, Plant and Food Research, as well as other stakeholders, helped steer the market research team into producing verifiable and trustworthy research results.

When it came time to implement the grower-facing phase, the marketing specialists were prepared in two main areas, to handle anticipated objections to the Taste Review's new settings, and to provide resources to assist growers in reaching the higher taste levels. Anticipating the objections and pushback from growers led to the marketing specialists to consult further with experts on every conceivable topic that may arise from the Taste Review. Although Zespri had created online resources like their website Canopy, which provides expertise on growing and managing kiwifruit orchard, the primary communications route in implementing the Taste Review was the Roadshow. Therefore, to implement the Roadshow successfully, marketing specialists coordinated resources involved in the Taste Review. These resources included analysts who developed the Review's settings, those who understand the fruit sampling and field testing process, a horticultural team within Zespri, and supply chain personnel. The special projects manager explained the result of pooling these stakeholders together and the subsequent delivery of information to growers both at and following the Roadshow:

“My job is basically to get out there to **pull all the resources together into a package, to tease out where those questions are that need to be answered.** And then get up and get those answers and then **turn that into something that we can then go into the industry to growers to talk about.**” (C2:P3)

Implementing the project also meant assuring growers, especially those whose previous harvests had not reached the new dry matter threshold, that help would be available. For example, although the new taste settings were achievable in most orchards, orchardists would typically aim to grow the most abundant crops possible in order to sell more fruit. However, the practice of growing larger fruit quantities would typically provide a negative customer experience. Zespri's plan was for growers to change their behaviour and produce a smaller crop with higher dry matter levels, leading to a sweeter taste. To compensate for smaller yields per hectare,

Zespri would increase their payment accordingly, with no payment at all for fruit with dry matter content below the new threshold. To achieve this goal, Zespri offered growers training in orchard management techniques designed to achieve higher dry matter content.

However, some growers were sceptical of Zespri's intentions. One participant suggested that Zespri's real plan was to reduce the amount of fruit going into the market, thereby making their role of exporting easier to manage. Other growers were concerned that, despite applying orchard management techniques, crops are still subject to poor environmental conditions which would lower dry matter levels. Growers and grower advocates also raised other issues. For example, as the marketing manager explains, some growers objected to the Taste Review being implemented almost immediately:

“From a marketing perspective, I want to push back on that and say, ‘the data says [consumers like kiwifruit at this level of sweetness]. It’s current, we need to go now...’ But in saying that, if they [growers] have a strong case pushing back, I think we can reluctantly accept that, as long as the discussion keeps going because we think it's so important. It will be a market-led discussion... [Zespri] firmly believe that we need to make that change now; if you want to slow things down then be that on your head.” (C2:P1)

As shown, now that research has determined the band of sweetness consumers prefer, Zespri uses this finding as leverage to implement their taste and payment settings without delay. However, Zespri recognises that pushback from the growers is not predominately about rejecting the Taste Review’s recommendations, but its immediate enforcement. As shown, despite having empathy for the growers, the marketing specialist follows up on grower pushback, i.e., ‘if you want to slow things down then be that on your head’. Cynically speaking, it seems motivating others with ‘the rhetoric of regret’ or ‘the fear of missing out’ is still a popular card to play with marketing specialists. However, what is demonstrated is the tension often found in a paradigm shift, where both sides engage in finding middle ground before moving onward together. In bringing together the individual grower’s livelihood and market objectives of a corporate entity, the marketing manager puts it this way:

“There’s only so much the research can tell you and then you need to apply some good judgement to that.” (C2:P1)

In other words, research may indicate the market's preferences, yet questions will remain regarding the intentions of the sponsor, the validity of the findings, and the readiness to change. These matters need to be pragmatically weighed as the marketing specialists played the role of change agents. Therefore, implementing the Taste Review required marketing expertise in several fields, as well as organisation familiarity and leadership skills. Specifically, the marketing specialists demonstrated knowledge of research, project management, analysis, presenting, arguing, assuaging, leveraging and applying pressure to influence a behavioural change in growers. Despite the persuasive tactics of marketing specialists, the readiness of

stakeholders to adopt the new taste and payment settings was not universal. Furthermore, organisation familiarity and life experiences played a significant role in relationship building with shareholders. As mentioned, several marketing specialists involved in the project were orchardists themselves and were therefore equipped to both anticipate, empathise with, and eventually influence the growers' perspectives. Moreover, these marketing specialists were able to more effectively communicate Zespri's Taste Review settings with growers during the implementation phase.

2.2.2.4 Appraising the marketing project

When appraising the Taste Review, the marketing specialists focused on the projects' impact on three main areas, the kiwifruit's sweetness, the growers' responses, and what the marketing specialists learned. Regarding the Taste Review's impact on kiwifruit, the marketing specialists explained that before 2014, the correlation between dry matter and sweetness was questionable. However, the research conducted for the recent Taste Review confirmed this relationship. Moreover, as the global manager explains, the research also showed a relationship between dry matter and the purchase intent of consumers:

“[Previously] there was a lot of scepticism at the time between the correlation of dry matter and purchase intent. And that’s absolutely locked in and firm now and come through all of our market research now... Some people didn’t believe that higher dry matter fruit would actually sell for more money or would actually be liked by consumers. [Growers] just thought like it was possibly a jack-up that came through the market research.” (C2:P2)

In other words, due to consumers paying more for sweeter kiwifruit, the market research justified Zespri's strategy to firstly set a minimum threshold and furthermore reward fruit of higher sweetness. The market research also served to confirm to Zespri and its growers the correlation between dry matter and purchase intent. However, the marketing specialists also admit there are other factors apart from dry matter that impacts on consumer preferences which are much harder to quantify. Several of the marketing specialists interviewed provided examples such as a kiwifruit's acidity, its volatiles, oils, and other aromatic nuances which affect the users' experience. Despite recognising their importance, the marketing specialists' understanding of how the intensity of these other factors relates to consumer preferences is currently vague. In sum, confirming the relationship between dry matter and consumer purchasing intentions, albeit serving as a basic indicator, helped to reduce grower scepticism in Zespri's taste and payment curves.

The Taste Review has also affected grower behaviour; growers are implementing the recommended crop management techniques and thereby increasing the dry matter content. This change means that since the project, there has been an increase in sweetness from subsequent harvests. As the global manager reiterates:

“We can now demonstrate that dry matter has actually lifted and we know that it wouldn't have done that. The only thing that is making it lift over time **is the change in management techniques.**” (C2:P2)

While this increase in the taste consideration of their harvest indicates an overall progress, the marketing specialists categorise the growers into three main groups: There those who agree with Zespri's new settings, and those who disagree with Zespri despite the findings, and a third, small group who suggest Zespri should be harsher with its taste curve and payments. The special projects manager suggested the third group were already producing sweeter fruit, almost certainly due to the virtue of their orchards' characteristics. Therefore, although the market research was extensive and carefully and thoughtfully executed, growers continued to harbour mixed views on Zespri's Taste Review settings. Overall, however, the growers complied with Zespri's Taste Review and changed their orchard management practices to maximise their return from the new payment scheme.

As well as appraising the Taste Review's impact on grower behaviour and the overall sweetness of subsequent kiwifruit harvests, the marketing specialists also described the positive effects the project had on them. Specifically, their market intelligence, their alliance with growers and other stakeholders, and their confidence in a dialogue-based marketing process. The main characteristic of the market intelligence appreciated by the marketing specialists was its robustness, due not only to the scope and scale of the research but also the calibre of the research team. However, the marketing specialists also realised that despite its quality, the research findings have a shelf-life due to the changing tastes of consumers over time and the popularity of kiwifruit in a region. Moreover, the marketing specialists understood that although they have a greater understanding of the correlation between different bands of dry matter and kiwifruit, other factors drive preferences that were not researched. Some of these factors were identified as the fruit's volatiles, acids, and oils, as well as customer perceptions of kiwifruit's convenience and health attributes. Despite these shortcomings, the marketing specialists were adamant their taste and payment curves were justified based on their current and previous research.

On appraising the Taste Review, the marketing specialists discussed how their relationship with growers and other stakeholders was strengthened in two ways. First, over the months that the project took place, all parties were reminded of the symbiotic nature of their relationship. The special projects manager puts it this way:

“So [the project] just reinforces that absolutely critical relationship and how it’s circular. Zespri can't market fruit unless growers deliver what consumers want, growers don't make money unless, you know. Post-harvest doesn't make money if we're not selling.” (C2:P3)

Having gone through the Taste Review process, the internal stakeholders gained a fresh understanding of one another's perspectives and challenges. The second way their relationship

was strengthened was the constructive, outcomes-driven dialogue that occurred between the parties involved. While the marketing specialists set out to be change agents in terms of incentivising growers to produce sweet fruit in favour of bulk harvests, they avoided imposing themselves too much. Instead, the marketing specialists presented the market's feedback and sort to engage change in a consensual climate. This approach demonstrated respect for growers and their expertise, helped create a consensus into the behaviour changes that were sort and led to a better-executed project. As the special projects manager said:

"People test your thinking, and again I think that's a good thing. **Out of it being tested, you get better ideas, better outcomes.**" (C2:P3)

From leading constructive dialogues toward better outcomes, another aspect of the strengthening of the relationship between Zespri and its growers was when recognition was credited from one party to another. By its nature, the Taste Review recognised and rewarded growers who grew sweeter fruit, but as shown, Zespri also recognised the criticisms given by growers were often constructive and rewarding. Moreover, the project helped growers recognised that Zespri were improving in their role as an export marketing firm. The special projects manager recalls one incident after conducting a Roadshow:

"I had a couple of growers come up to me after one of the presentations... and said to me, 'we remember the 2004 stuff. The way you've presented this [Roadshow] and **the level of thought that's gone into it... and it gives us a great degree of confidence** and shows that gee, we really do understand our consumer.'" (C2:P3)

Along with strengthening their ties with other stakeholders, the marketing specialists also recognised their dialogue-based marketing processes had prepared them to present their roadshows confidently. In other words, the chances of success improved by purposefully inviting growers, stakeholders, experts, and personnel into talks to find weaknesses in aspects of the Taste Review proposals. As well as taste-based payments based not being new to growers when appraising the delivery of the latest roadshow, a global marketing manager said:

"We have **anticipated a lot more of the flashpoints for criticism and concern** and we've got well organised and collected our data to make sure we've got those covered off." (C2:P2)

As a further example, one of the presenters for the Roadshow, the special projects manager, also credited:

"By and large we haven't come across a question where we thought, 'hmm, **we hadn't thought of that.**'" (C2:P3)

In appraising Zespri's 2015 Taste Review, the marketing specialists considered it an overall success for several reasons. Their reasoning includes the positive impact on grower behaviour, subsequent sweeter kiwifruit harvests, and the deeper, richer understanding they have with the market, the growers, and their marketing processes. However, the marketing specialists also

acknowledge that there were external reasons that may be attributed to the success of the project, including favourable environmental factors; at the time of writing, Zespri was reporting record sales (Zespri, 2017). In sum, the positive outcomes achieved from the project may in large part be attributed to the marketing specialists' inclusive approach to its research activity and stakeholder engagement. Here, the main knowledge domains used during the appraisal were market intelligence and organisation familiarity. These two knowledge domains incorporate the appraisal of the two phases of the Taste Review, namely the market research and the subsequent internal marketing. By largely appraising these two areas, the marketing specialists were able to assess their project sufficiently.

2.2.2.5 Marketing specialists' knowledge within projects

To sum up, from the planning to implementing phases in Zespri's Taste Review project, the marketing specialists used aspects of the five knowledge domains identified in the literature review. However, certain knowledge domains appeared to play a more significant role within each phase. During the planning phase, aspects of the marketing specialists marketing expertise, organisation familiarity, and market intelligence were either utilised or sought. Whereas during the development phase, market intelligence, organisation familiarity, and leadership skills came to the fore. When implementing the project, aspects of marketing expertise, organisation familiarity, leadership skills and life experiences were the main overriding topics. During the appraisal phase, organisation familiarity and market intelligence were the dominant knowledge domains. Overall, each knowledge domain played a role as various marketing specialists planned, developed, carried out and evaluated both the market research and internal marketing phases.

2.2.3 RQ2: The influence of marketing specialists' knowledge

Zespri's marketing specialists' influence has been analysed at three levels: the marketing specialist, firm, and market levels. The marketing specialist level describes where the marketing specialists influenced one another and subsequently the Taste Review project. The firm level relates to the marketing specialists' influence with its internal market, namely board members, management, and other colleagues, but primarily Kiwifruit growers. The market level describes and analyses data of the marketing specialists' influence on the market or on-sellers of the kiwifruit and its consumers. In brief, the following section discusses the influence Zespri's marketing specialists had among themselves and their project, Zespri and its shareholders, its target market and the kiwifruit industry.

2.2.3.1 Influence at the marketing specialist level

The marketing manager influenced other marketing specialists in several ways; however, feedback from participants strongly suggested her primary influence was serving as the project's facilitator. As the primary facilitator of the project, the marketing manager reportedly performed

several roles. These roles included contracting the appropriate marketing resources and experts from within and external to the firm while simultaneously preserving Zespri's branding and business objectives. Selecting key personnel was one of the key approaches the marketing manager used to influence the Taste Review at the marketing specialist level. Concerning recruiting for the research aspect of the project, the research specialist reported:

“[The marketing manager’s] been **selecting the key people** to involve into this project within Plant & Food, within [our agency] ... building the team for the task... to ensure that we... could do the best [research].” (C2:P4)

As well as the research project, the marketing manager also selected experts to advise on how to best manage the grower-facing aspect of the project, the Taste Review Roadshow. As the marketing manager explains, they needed to get the right experts together to better understand the grower’s perspective in order to shape the project accordingly:

“**Who do we need to get in the room to help us influence** those groups or how do we understand where they’re going to come from, what their challenges are going to be?” (C2:P1)

By gathering marketing experts and applying their knowledge and experience to either the research or roadshow aspects of the project, the marketing manager’s influence was primarily facilitating talks. Subsequently, the ideas, perspectives, and recommendations from these experts were collected and linked in order to develop a robust project. However, by gathering experts from within and external to Zespri, the marketing manager also had to manage the various agendas which were raised during talks. For example, Plant and Food Research’s main interest in the research aspect of Zespri’s project was the science of sensory research. As the research specialist explains, the marketing manager had to ensure that the research methods best served Zespri’s market objectives:

“A key role of [our marketing manager was] at the beginning of that process to **ensure the project was delivering what the business needs**, science comes after.” (C2:P4)

As described, Plant and Food Research provided experts to assist with the sensory research; however, their leaning toward the science aspect rather than the commercial aspect was skewing the methodology. To counteract, the marketing manager drew the research back toward making sure the research would serve Zespri's commercial interests. In like manner, stakeholders whose expertise was sought had their perspectives subjugated to the business objectives Zespri had established. Therefore, while their influence on the project might be described as facilitation, the marketing manager was simultaneously manoeuvring external specialists and their agendas toward a market-driven objective. As the research specialist put it:

“**We are external from Zespri, so we need someone at Zespri** to make decisions and sign off at the end of the day, so [the marketing manager] has that role.” (C2:P4)

As the research specialist points out, the stakeholders would provide their perspectives, but it was the marketing manager who made the final decisions on the project. Also, the marketing manager invited thinkers from other areas to assist with decision-making. By adding this step, the marketing manager reviewed the expert perspectives and objectives of the project, sans-agendas:

“It really helps to **have those wild card thinkers** or the plant breeders or someone from another department or somebody from outside the business in the room to challenge [you], ‘Why are you making that call?’” (C2:P1)

Despite the various ways the marketing manager was described as being influential, examples of the influence of the marketing manager’s expertise were absent. According to the marketing manager, they had won their role based on their experience with Zespri and their public relations and communications degree. However, at the time of the case study, the marketing manager had enrolled and was about to attend, an intensive marketing course in France, sponsored by Zespri. Nevertheless, the participants did not regard the marketing manager's lack of academic marketing qualifications as a drawback, presumably due to the sphere and range of marketing experts Zespri could access. Therefore, Zespri's Taste Review was influenced presumably by the marketing manager's objectives-driven team building skills, rather than their marketing expertise.

In reflecting on the marketing manager's influence at the marketing specialist level, her main contribution was her project management and communications skills. As shown, these skills are aspects of her organisation familiarity, leadership, and life experience knowledge domains. Other marketing specialists such as the externally sourced market research consultants and academics, and Zespri's global marketing managers all contributed their areas of knowledge which influenced the project's settings. As discussed, what the marketing manager lacked in areas of expertise, she could access from a wide and varied resource base to ensure an effective and persuasive project output. In this case, the marketing manager's role was first to understand Zespri's consumer's taste preference, and then develop an internal marketing campaign to influence growers to satisfy their customer’s preferences. With these objectives in mind, the marketing manager major influence was to ensure these objectives were the focus of every marketing specialist involved in the project. In taking this course, the marketing manager was able to leverage her internal and external subject-matter experts toward adhering to the project’s purpose.

2.2.3.2 Influence at the firm level

Apart from the marketing specialist level, the study also investigated how marketing specialists were influential at the firm level. The firm level refers to non-marketing personnel throughout Zespri, including senior staff and board members and particularly growers, as grower behaviour was central to the project. Concerning influencing senior management, one of the marketing

manager's tasks was to convince Zespri's decision-makers of the need for the project. As the research specialists put it:

“The other role which is very important in this is **to convince the board, and CEO, CFO, and everyone else** that what we're doing is the right thing to do, ‘cause it does cost a lot of money. And therefore, before it all happens [the marketing manager] and the team **needs to demonstrate, the validity, the benefit to the business...** and get the board to sign off.” (C2:P4)

As the key player in the international sensory research, the research specialist also played a part in convincing senior decision makers of the importance of exporting consistently tastier fruit. In particular, the findings of the sensory research demonstrated that action was needed to change grower behaviour so that Zespri would maintain its competitive advantage in each of its markets. Therefore, while the sensory demonstrated the need for the Taste Review project, its primary influence would be to convince growers to change their growing techniques and produce sweeter kiwifruit. The special projects manager put it this way:

“It’s **translating market signals back to the grower** and trying to drive grower behaviour to deliver what the market wants.” (C2:P3)

As shown, the Taste Review project was aimed primarily at influencing grower behaviour. One of the key components of the Taste Review was the taste standard and payment curve that was developed by Zespri, which was designed to reward growers for producing fruit with the right characteristics. Hence, a major influence on growers, who are shareholders of Zespri, was the incentive scheme. The liaison manager puts it:

“Money is everything... **Put money on the table [and] growers will find a way to achieve it.** You know, all these guys they are very smart growers, very good horticulturalists and they work out very quickly that hey if we grow sixteen thousand trays a hectare of crap, we get more money than growing eight thousand trays of high taste.” (C2:P5)

In other words, growers were not sufficiently incentivised to grow fruit with the taste attributes the market was seeking in the previous payment plan. Now, growers were motivated to exceed the minimum taste level, which was identified using the sensory research, in order for their crops to be accepted for export. Moreover, as the special projects manager asserts, the payments plan also provides growers with a reason for producing fruit that exceeds the minimum taste levels:

“[The payments plan is] to incentivise [growers] to move further up the taste curve... To make decisions on their orchard to move further up the taste curve... we want people to move up; we want to be paying for taste.” (C2:P3)

As discussed earlier, the growers responded to the payments scheme. Although scepticism existed among growers on the sum of Zespri's intentions, growers began to reduce the volume

of their crops in order to have their fruit selected for export and to move higher up the payments plan. One of the growers from the focus group explains:

"[Zespri was] adamant that we had to change our behaviour with the way we grew the fruit and **they had to put a dollar value on the dry matter** so that we would change our behaviour. So that's what happened, and **the behaviour changed immediately.**" (C2:P6)

The Taste Review project also reminded growers of Zespri's competitive edge over kiwifruit exporters from other countries. As well as maximising the profit they could make from their crops the growers were also made aware of the value their brand had overseas. While the payment scheme and brand awareness were major approaches in influencing grower behaviour, the marketing specialists also employed other methods, specifically peer pressure and scare tactics. Concerning using peer pressure, the marketing specialists invited growers annually to the various markets where their fruit was sold overseas. During these tours, growers would speak to and collect feedback representatives from the large retail groups that on-sold the kiwifruit to consumers. The liaison manager explains the process further:

"We usually got fairly influential growers on those tours, and then they came back and told the other growers. We could use them at the grower meeting for instance when we were talking about taste. We could then pick the grower from the crowd, without, you know, no set up; just say 'Ken you came to Japan with me, what was the message you got from the markets?' And a grower would say it, **and it was a lot more powerful a grower actually saying,** 'I've been there, seen it, this is how it is.'" (C2:P5)

As well as peer pressure, the marketing specialists also used scare tactics to influence grower behaviour. In one instance, the marketing specialists invited the marketing manager from Japan to speak to growers. Incidentally, the Japanese market pays the highest premiums of any market for kiwifruit. The liaison manager recounts the event:

"The market manager in Japan then... spoke at the AGM saying to growers, 'if you send me the same gold fruit as you've been sending me, which **my customers are liking to potatoes, you won't have an industry.**'" (C2:P5)

However, although growers know the Japanese as a discerning market, one of the growers interviewed seemed sceptical about Zespri's tactics:

"They used scenarios like the Japanese saying, 'Hey, 20 years ago we used to think the fruit tasted better'. But **I think that was probably a little bit scare tactic.**" (C2:P6)

As well as the market research, the incentive payments, peer pressure and scare tactics, the marketing specialists were influential by providing technical support to improve grower behaviour. Whether growers' harvests were historically above or below the new taste threshold, the marketing specialists provided details of procedures growers could use to produce sweeter kiwifruit. These procedures were described as technical, horticultural, and growing resources. During the Taste Review, the marketing specialists strove to clarify that the Taste Review was

not a punishment on growers who typically produced below the taste threshold. Rather, it was about providing incentives and resources so that the fruit would meet the market's preferences. The special projects manager puts it this way:

"It's not about the industry tearing ahead of those that are at the back. It's about moving ahead towards what the consumer wants but helping those to get up to the standard. Because at the end of the day all the fruit has that one brand on it; so, it's in everyone's best interest to get everyone up to the best standard." (C2:P3)

In brief, the special projects manager summarised the ways the marketing specialists sought to influence the growers:

"It's not so much trying to sell it to them, it's more to develop an understanding of [the taste-based payments], so people understand why it's that number, that we have considered the other options and we have come back to this number for sound reasons. You're not always going to get everyone to agree, but's there's an art here in terms of having the vast majority of people having faith in the process." (C2:P3)

In this excerpt, the special projects manager describes their approach to influencing the growers was not trying to 'sell it', but to provide sound evidence and appeal to growers' business sense. Other marketing specialists on the project agreed with this approach. A global marketing manager adds:

"Do the work: bring the right minds together, get the right science, get the right market data and then demonstrate that it is actually making a difference and that's when you start to get some actual traction." (C2:P2)

Apart from convincing growers about adopting the measures proposed in the Taste Review, the project's implementation influenced the firm in other ways. As various aspects of the Taste Review were held in Zespri's major markets, the marketing manager reported that the role they undertook in the project had increased collaboration between Zespri's international bases:

"This role is quite instrumental in pulling the business together; in the past, we've been quite silo-based... it had been quite a challenge to have any influence or engagement with some of our offshore teams. So... I think I've got a style that was going to be useful in helping to bring those teams together and work more collaboratively." (C2:P1)

In summary, the marketing specialists were influential at the firm level, from the board and senior management, the growers or shareholders, to the Zespri bases around the world. Regarding the board and senior management, the market research demonstrated that grower behaviour needed to change in order to meet the preferences of consumers. The research, the incentive scheme, and the other tactics implemented by the marketing specialists were used as leverage to convince growers of the need for change and facilitate it. Lastly, conducting the project provided the opportunity for the various global Zespri bases to work more collaboratively. In short, the Taste Review required the influence of the marketing specialists throughout Zespri in order for the project to be successful.

As shown, the marketing specialists' knowledge influenced Zespri in several ways. Concerning the growers, the marketing specialists' market intelligence on their consumers' taste preferences was a major influence, as well as the payment incentives. Also, organisation familiarity played a significant role in developing the technical support to assist growers whose crops were at risk of falling below the minimum taste threshold. Also, life experiences, although it played a less significant role, may have contributed to the marketing managers employing peer pressure and scare tactics to leverage growers into complying with the Review's settings. Regarding Zespri, the breadth of the marketing specialists' span over major sectors of the firm both in New Zealand and internationally, was influential in creating stronger relationships between its bases. Finally, the marketing expertise influenced the confidence of Zespri's board and senior staff into signing off and funding the Taste Review. By drawing on their knowledge, the marketing specialists produced not only a snapshot of its consumers' taste preferences but steered a typically obtuse shareholder base into producing tastier fruit.

2.2.3.3 Influence at the market level

As well as the marketing specialist and firm level, the evidence describes Zespri's marketing specialists' influence at the market level. The market level includes Zespri's retailers, wholesalers, distributors, and competitors, as well as Zespri's target market, the kiwifruit consumers. Although they were not a major focus of the Taste Review, the retailers, wholesalers, and distributors, or as Zespri call them, 'the market', were of concern to the marketing specialists. In brief, while they might influence the quality of fruit leaving New Zealand's shores, Zespri is limited in how its fruit is distributed to the market. For instance, kiwifruit has a short shelf life and selling the fruit that is unready or too ripe is likely to ruin the eater's experience. Therefore, as the special project manager asserts, the marketing specialists aim to influence their market into selling kiwifruit at its peak condition:

“We’re constantly looking at how we work with our retailers, our wholesalers, our distributors to ensure what gets off the ship gets delivered to the shelf in premium condition.” (C2:P3)

As well as the timing of the kiwifruit going to the market, the marketing specialists also tried to minimise the length of the selling season. This strategy helps the supply chain in selling a premium, more consistent product, and reducing fruit waste. As well as influencing the market, the marketing specialists discussed the influence they have with their competitors. As Zespri is the premium kiwifruit brand globally, a major influence it has on the market is its role as the first mover. For instance, other brands not only imitate the labelling, packaging, and quality standards of Zespri, as the marketing manager points out, they also 'ride on our coattails' and raise their prices. To take precautions, the marketing manager explains:

“We’re very cautious. We do consumer sensory research in Shanghai and after we’re finished, we’re trampling all of the packaging so it’s not being used. We’re very

strict on our confidentiality agreement with our research partner. To say if we find out that you're talking to anyone else what we're doing... because we know it's a really strong IP [intellectual property] and the way we conduct our research, how sophisticated it is." (C2:P1)

In other words, the marketing managers take strong measures to protect the intellectual property they develop as a result of the research they undertake in other countries. However, the marketing manager also points out:

“We hold this information relatively tight, but **we’re also in an incredibly leaky industry.**” (C2:P1)

Apart from the influence the marketing specialists have on the market and their competitors, their chief aim is to influence their consumers into buying Zespri branded kiwifruit. The aim of the sensory research, the incentive scheme, the supply chain management, and the security of their IP was to provide consumers with a premium kiwifruit eating experience. By providing a trusted, quality product, Zespri also aimed at charging a premium price. The special projects manager reinforces this view:

“Well it **underlines the brand so if you’re delivering good tasting fruit consistently**, the brand's in good shape. We've gone out and built a brand and invested a lot of money in it, and if you're not delivering on the brand promise, then the brand quickly loses its credibility.” (C2:P3)

As described, the investment in the brand, the Taste Review project and previous projects was to maintain Zespri’s premium offering to the market. Therefore, the marketing specialist influence on the market, whether on the distributors, competitors, or consumers, was to control the quality and credibility of their product. The marketing manager sums it up this way:

“There’s no doubt in my mind that **this [project] has impacted our ability to maintain our premium position** in the market.” (C2:P1)

The marketing specialists’ knowledge influenced its market in several ways. As shown, the institutional marketing expertise has become a benchmark for competitors around the world to reach. Packaging, intellectual property, and other marketing and branding aspects have been copied as well as the price of kiwifruit as competitors seek to emulate the Zespri brand. Regarding its brand, due to the marketing expertise invested into it, of which the Taste Review is but one example, the market is subsequently willing to pay premium prices. Furthermore, with the market intelligence regarding the minimum and maximum threshold for the sweetness of fruit, Zespri had reported its highest volume of sales (Zespri, 2017). This influence on the market might be attributed to Zespri’s pursuit of understanding their consumer’s taste preferences, although packaging, branding, and other factors surely contribute significantly as well.

2.2.3.4 Zespri's marketing specialists' influence

The marketing specialists' influence extended over the marketing specialist, firm, and market levels for several reasons. First, to exert sufficient influence to change shareholder's growing behaviours, the marketing specialists captured and leveraged Zespri's consumer's voice, adding taste thresholds and financial incentives to ensure compliance. Here, the marketing manager assumed a central position within the project, aggregating the expertise of colleagues, marketing consultants and researchers, scientists, shareholders and experts from other industries. Using Zespri's goal for understanding its consumers taste preferences and adjusting its product accordingly, the marketing manager was able to direct each stakeholder within their various roles. Once consumers' taste preferences had been ascertained, other experts were brought in to determine the appropriate taste thresholds and payment scheme for the Review. Therefore, to mitigate the project's processes being undermined by disgruntled shareholders, the marketing manager was able to demonstrate the objectivity undertaken throughout the project's entirety. Overall, the marketing specialists' influence was leveraged by three of the following factors. First, the growers' desire to remain with Zespri. Next, the Taste Review's global research on taste preferences of consumers. Finally, the financial incentives offered to growers whose crops reached or exceeded the taste thresholds. In short, the marketing manager's rigour and objective approach helped maintain the leverage required to influence growers into adopting cropping management techniques that increase the likelihood of producing sweeter fruit.

2.2.4 Summary of the Zespri case

As discussed, the success of Zespri's Taste Review was influenced significantly by each of the marketing specialists' knowledge. Their knowledge, which comprises of marketing expertise, organisation familiarity, market intelligence, leadership, and life experiences, was constituted by a vast array of business and personal experience. Overall, this knowledge led the marketing specialists to quantify the taste preferences of its consumers and develop an internal marketing project to change grower behaviour to reflect market preferences. The Taste Review project was developed from an array of marketing specialists' knowledge during the planning, developing, implementing and appraising of their marketing project. Moreover, their knowledge went on to influence the marketing project's settings, Zespri's growers, its international bases, and its market and competitors. In brief, the 2015 Taste Review is an internal marketing project designed to influence grower behaviour toward producing better tasting kiwifruit to maintain higher premiums. To this end, their project produced global market research, industrial, academic, and cross-industry partnerships, as well as multiple promotional and technical support processes to influence grower, distributor, and consumer behaviour. Recent reports regarding Zespri's record sales suggests that the 2015 Taste Review had a significant return on investment (Zespri, 2017).

2.3 Trustpower

2.3.1 List of evidentiary sources

For Trustpower, one-on-one interviews were conducted with a general manager, a senior manager, their marketing manager, and two external marketing consultants. These interviews were audio recorded and averaged 96 minutes. Once transcribed and checked, each transcript averaged around 30 A4 pages. The focus group consisted of five participants from Trustpower's sales, operations, administration, and frontline, whose audio recording was 94 minutes long, creating a transcript of around 39 pages. The marketing manager's reflective journal, minus the questions, totalled 807 words.

The digital artefacts collected from Trustpower are as follows: Jpegs of the old Trustpower logo and the new logo. A web banner displaying the \$49 Comic-con offer. Four TV commercial videos: The Better Together ad, the first Comic-con ad, the follow-up Comic-con ad, and a 193-second video clip providing a background of Trustpower and its offering of bundled services. Also, 106 slide PowerPoint presentation showing the 2015 Trustpower Annual Report. The interview and focus group transcripts, the marketing manager's reflective journal and the marketing artefacts were examined for evidence relating to the research questions about marketing specialist knowledge and influence. Therefore, the following section addresses the research question *RQ1: How was marketing specialists' knowledge used when planning, developing, implementing, and appraising the marketing project.*

2.3.2 RQ1: The marketing specialists' knowledge

As mentioned, the marketing team is under the Markets team's umbrella, and their primary job is developing the promotional aspects of the products the Markets team create. The marketing manager began working for Trustpower after the rebranding work had been done and was in charge of developing the \$49 campaign. The marketing manager, graduated from Oxford as Biological Chemist. However, she worked in a small direct marketing firm managing outbound telemarketing roles. Next, she worked as an account manager and then as an accounts director at Ogilvy's in London, working with the creative talents of Rory Sutherland and Cordell Burke. During this time, the marketing manager learnt how to work between creatives and clients and how to fulfil client briefs and achieve their business objectives. The marketing manager describes the knowledge and capabilities previous roles had provided her:

“It’s project management, its financial management, and its diplomacy, and it’s building relationships as well. And that was a key thing, that I think, in the agency world. I was very good at was the actual client management, the actual building the relationships and gaining the trust and respect of the clients.” (C3:P3)

After moving to New Zealand, the marketing manager gained employment and successfully developed a direct marketing campaign with a privately-owned firm. While there, the marketing manager used a small budget to analyse and segment customers as well as analyse their marketing campaigns to determine patterns that would grow sales. As the marketing manager for this private exporting firm, she also experienced working on the client side, rather than the agency side, of advertising. This experience helped win her the marketing manager role at Trustpower where she began to manage the bundled offer developed by the teams under the Markets department. Further, another influencer on the marketing manager's thinking was Martin Lindstrom, particularly his book *Buyology*. For instance, the marketing manager discussed how the author's findings on how emotions drive customers toward buying had helped her decide not to develop *shouty* or logic-based advertising for Trustpower. Therefore, previous roles and influencers informed her briefing strategies, creative work, finding the essence or key message of a creative proposition, and diplomatically handle the challenges of account management. When asked about their marketing manager not having a degree in marketing, Trustpower's general manager replied:

“But what’s a marketing degree worth?... it's the same as any degree; you can learn the principles of marketing through experience as well as through education... I think even if you’ve got a marketing degree you need to learn things the hard way anyway.” (C3:P4)

Therefore, based solely on their experience as a researcher, albeit in cancer research, in telesales, agency account management, and direct marketing, the marketing manager won a role with Trustpower. Before the marketing manager won this role, Trustpower had contracted some strategic and creative marketing consultants to rebrand their firm. One consultant, a brand strategist, had worked as a senior account manager or account director. However, at the time of the interviews, he had worked as a freelance consultant for over four years.

Another marketing specialist contracted to work with both the brand strategy and the campaign, runs his consultancy in Auckland. Having worked in large agencies for many years, the creative consultant now runs a small agency which provides creative services to larger agencies. As the brand strategist and creative consultant had worked on Trustpower's rebranding, they were also contracted to work with the marketing manager on the \$49 campaign. Therefore, Trustpower's projects were advanced by the marketing specialists found throughout the teams overseen by Markets and included the marketing manager, and the brand strategist and the creative consultant. In sum, the marketing specialists contributed to the projects using their diverse areas of knowledge and creative ability. Areas of knowledge include the marketing expertise of the marketing manager regarding research, direct sales, account management, and advertising, although she did not have a marketing degree. A combination of marketing expertise and life experiences are likely to have contributed to the marketing manager's focus on the project's emotional, rather than attention-grabbing, messaging. Also, other marketing specialists within

Trustpower's Insights team demonstrated market intelligence and organisation familiarity when they correlated customer churn and bundled utilities. Regarding the marketing consultants, one came with some organisation familiarity with Trustpower based on previous consultancy work and association, as well as many years' experience in branding and account management. The other marketing consultant, the creative consultant, admitted he had minimal knowledge in design, artwork, and Trustpower. However, his expertise was in generating creative ideas and in developing the subsequent scripting, radio, television, online, and print advertisements. Collaboratively, each of these marketing specialists played a significant part in rolling out Trustpower's rebrand and bundled utilities market offering.

2.3.2.1 Planning the marketing project

In preparation to launch into New Zealand's major metropolitan areas, Trustpower undertook two major projects; first the rebranding project followed by the \$49 bundle offering. The key overall objectives were to increase awareness and consideration of Trustpower as a New Zealand company and its unique bundled utilities offering and the savings this offering provided. As the marketing manager puts it:

“We had these objectives which were very clear that we didn't want to be a bland, boring, another power company. We wanted to try and start **building a brand image that had some personality and had some emotion.**” (C3:P3)

Previous research conducted by Trustpower showed that people often cannot be bothered to change power companies despite being offered better deals and generally were not engaged with their power company. For example, the marketing manager recalled a focus group where some participants were unable to identify who their power supplier was. In contrast, findings suggested that people were far more engaged with their telecommunications supplier. At the time of Trustpower's launch, other telecommunication suppliers were offering unlimited broadband at between \$99 to \$109 per month. Therefore, Trustpower believed their offer of \$49 for unlimited broadband for signing over to their power supply would motivate people to switch to them. This belief led to Trustpower planning to penetrate New Zealand's metropolitan markets. So, while Markets had proposed \$49 bundled utilities approach, with modelling showing that it was viable both logistically and profit-wise, Marketing was then tasked to produce an advertising campaign. Therefore, Trustpower's approach was to create above-the-line promotions to introduce their brand and bundled offering in metropolitan areas. Having achieved these objectives, their outbound sales teams, situated in Trustpower's call centres, plus their contracted door to door sales teams, would then aim to hit their sales targets. The general manager outlines the marketing manager's task:

“[The marketing manager's] challenge if you like, was to determine the appropriate media mix and appropriate media plan which included a media buying plan and the creative. And to **pull all that together in a way that was directly in line with our**

campaign programme... I guess that's the practical part of what she needed to do. And then **the more sort of specialist marketing part of that was to ensure that the fundamental brand personality and values were conveyed and were consistent** in the [communications] that were produced." (C3:P4)

To plan the advertising campaign, the marketing manager contracted and briefed the brand strategist and creative consultant on the project. First, the marketing manager insisted that the promotion be emotive and create awareness, consideration, and desirability for its audience to join Trustpower. During talks with Trustpower's management, the creative consultant determined that although they could bundle power, broadband, phone, and gas, that the campaign would focus on two utilities only. Therefore, only power and broadband were characterised in the TVC to simplify the campaign's message, although a gag related to gas was used in the first advertisement. With a simpler bundled offering, the price of \$49 also needed to be advertised. With this brief in mind, the creative consultant understood that the TVCs needed to simultaneously facilitate a traditional branding campaign, a repositioning campaign, and a retail campaign. The creative consultant partly described his planning procedure this way:

"I write down those absolute things that need to be done. We need to communicate clearly that the company is an electricity provider and a broadband provider. By combining the two things, there is a low price point, for broadband which is... \$49... **these are the functional things that need to be achieved. The uptake of the ad needs to be emotional** which is 'I want to be part of that, I like that company, it's something I'm interested in. I bond with it, I engage with it, I feel warm towards it, it feels like it's speaking to me, it's relevant, it's on my wavelength', all those things." (C3:P5)

To achieve this brief, the consultants proposed that Trustpower commit resources beyond a 30-second TVC. Therefore, to fulfil the brief, Trustpower authorised the creative team produce a large-scale television and long duration advertisement campaign. Having been presented a clear brief and the resources to develop an extensive promotional campaign, the marketing specialists needed a creative idea in order to develop the marketing project. To plan these successive projects, the marketing specialists involved applied their knowledge from the knowledge domain categories developed from the literature review. In particular, the planning process drew from market intelligence in identifying the market's attitudes toward utility and telecommunication providers and in assessing their competitor offerings. Also, marketing expertise and leadership skills were apparent when the marketing specialists determined the price structure to motivate their audience to switch providers. Moreover, marketing expertise and leadership were also conspicuous when briefing the marketing consultants, planning the frontline service, and having the advertising budget increased significantly. Hence, during the planning phase, marketing expertise, market intelligence, and leadership played significant roles.

2.3.2.2 Developing the marketing project

Having completed the rebranding campaign, the marketing specialists focussed on developing the bundled product launch. Developing the campaign was described as having three main parts. First, the marketing manager's brief to the creative agency, followed by the collaborative process between Trustpower's marketing decision makers and the agency and finally, assessing the logistics of the campaign. Having selected the same strategic branding and creative consultants that carried out the rebranding project before her appointment, the marketing manager provided them with the following brief:

“Like any marketing campaign, **I created a brief for the agency**, the key points; that I wanted something emotional, still needed to be brand building but it still needed to be, **the central concept** is still about bundling about bringing power and broadband together.” (C3:P3)

Developing the concept that Trustpower finally arrived at underwent an extensive process of collaboration and creative thinking between the marketing manager, the creative consultant, and at times the general manager. The following excerpt is a snapshot from the marketing manager's perspective of the collaborative process of developing the concept for the TVC, with the creative consultant:

“I knew that **I wanted to do something emotional**, and so we started thinking just with the creatives... along the lines of... bringing two things together to create something better, that was our key message, and then [our general manager] goes, ‘Well what is the best thing when two things come together? A love story’... Then **it was over to [the agency] to come up with the exact way to express this creatively**. And so, it was [the creative consultant] who came up with the Comic-Con setting... So, he then came back with the script.” (C3:P3)

From an observer's perspective, the development of the Comic-Con concept materialised due to the virtue of a tight brief. For instance, the TVC had to be emotional and demonstrate the notion of the whole being greater than the sum of its parts. While the love story suggested by the general manager provided a plot, the TVC also needed characters and a setting; the responsibility of which fell to the creative consultant. In the following excerpt, the creative consultant describes the thinking process behind the concept and script for the campaign:

“If it was two Gods, the God of Electricity and the God of Broadband? You go ‘that's a ridiculous thing, that's so far from the brand they would never do it’... However, what was interesting, you go, ‘what would the God of Broadband look like?’ So, **although the idea is not right, it leads you to another thought**... Then you go, ‘where do people dress up in ridiculous God outfits?’ At Comic-Cons... You go, ‘okay that's good... if there's two people dressed in these things at a Cos-play convention how would you get them together?’ Well, of course, they'd have to be unknown to each other and two strangers falling in love. The outcome is better than them being their individual. So, **all the logic falls into place**.” (C3:P5)

As described by the creative consultant, his creative thinking process temporarily pushes aside any limitations the company imposes. For example, while deifying electricity and broadband

was a creative starting point, the creative consultant recognised that Trustpower would not accept that particular setting. Eventually, the idea led to a more rational and appropriate concept which fulfilled the brief. Aside from the Comic-Con project, the creative consultant provided a more general description of their thinking processes when developing ideas for projects:

“You have to get all the information you can, and you have to think about it, and generally a solution will occur. But that's through logic and thinking about it. Often that's the awful cliché, **that it happens in the shower**, or whatever. **It tends to be for me in the middle of the night...** I do think that **the more you work on trying to solve a problem the better, but the actual solution very rarely comes when you're trying to do that solving.** It usually comes at a completely separate time. So, I understand what you call a lightbulb moment, but I think it doesn't happen unless you've been doing a lot of thinking about it anyway. So, **I don't think it's like a free ride.**” (C3:P5)

As described, the marketing specialists immersed themselves in the campaign by researching advertising approaches, brainstorming, and conducting workshops in the planning and development stage. This work provided a brief with which the creative consultant applied his creative processes, as well as a framework with which Trustpower would judge the concept for the TVC. The concept of the Comic-Con TVC was accepted immediately by the general manager and the board. Due to the high degree of confidence in the Comic-Con concept, they decided not to test it on a focus group, as Trustpower's had on the previous rebranding campaign. Having approved concept for a TVC, and by reusing the director and crew who worked on the rebranding campaign, the marketing specialists looked toward the logistics of the campaign.

The logistical considerations for the campaign included creating integrated marketing messages, providing support for sales channels, and purchasing media space. Within Trustpower, although the marketing specialist and the creative consultant have developed the TVC's concept, other specialists in other departments managed aspects of the marketing logistics. For instance, during the focus group, the marketing advisor describes how the Campaigns team develop the campaign's internal marketing messages:

“[The Campaigns team] put together the campaign education material for the... different [sales, administration, and operational] channels. **So that all of the channels know what the offer is**, the facts of the offer and then the marketing material that goes with it.” (C3:P6)

The telesales team leader adds:

“The campaigns team put together the resource and support required for the sales channels and work with the markets and marketing team **to align campaign timeframes and processes, they work very closely with Marketing and market/customer Insight.**” (C3:P7)

Although the Campaigns team's job is to consolidate and integrate Trustpower's marketing messages, other departments had already contributed their perspectives, concerns, and resources

to the campaign. In other words, dealing with logistic resolutions required other specialists in Trustpower's various departments to come together in a marketing-oriented way. The telesales team leader explains:

“It’s about the holistic approach isn’t it... So, all the approaches and the discussions that every department has in relation to the offer is really what glues it together I think.” (C3:P7)

The digital channel manager agrees:

“When there are 20 of us [from various departments in Trustpower] sitting in the room, [that is] a lot of collective knowledge and experience.” (C3:P8)

As described, cohesion among departments occurred while working the logistics out around the launch of the campaign. As well as clarity undergirding the project's internal machinations, it assisted the marketing manager when working with those external to the firm. For instance, the marketing manager made more informed decisions on which promotion mediums to use:

“We work with a media buyer, so it’s the discussions with him about what kinds of media are going to be the most effective to reach our target audience (C3:P3)

As shown, to maximise return on media investment, the marketing manager described seeking help to select the appropriate media and the TV channel and slots for the TVC. Hence, due to the precise aim and concept developed for the campaign, the media buyer was able to advise the marketing manager of the most appropriate media mix.

As shown, the marketing specialists combined their marketing expertise, market intelligence, and organisation familiarity to develop the brief for the bundled offering. Furthermore, with particular regard to the marketing manager, the evidence also demonstrated her leadership when collaborating with consultants, various internal departments, and media companies. Her partnership with selected stakeholders meant that logistical issues were identified, resolved and shouldered by the relevant subject-matter experts, managers, or collaborators. Although understated, knowledge drawn from the marketing specialists' life experiences were also evident, particularly in her values and ways of understanding that were demonstrated. For instance, rather than conduct a focus group to confirm the cut-through for their advertisement concept, the marketing specialists 'knew' they had developed the right marketing and branding message. To conclude, in developing their project, the marketing specialists demonstrated aspects of each knowledge domain identified in the literature review.

2.3.2.3 Implementing the marketing project

Project management skills were used extensively by marketing specialists when implementing their campaign. Specifically, the marketing manager helped select the agency as well as advise on the creative direction, production, and casting of the TVCs. Furthermore, the marketing manager oversaw the creation and implementation of various marketing collateral, along with

the creative consultant. The marketing manager discusses some of the promotional work they implemented for the campaign:

“We did TV, we did radio, we did bus backs, billboards and online, [they] were the channels that we were using... **They were all informed decisions about what was going to be the best, the most effective way to start out** in Auckland, Hamilton and Wellington.” (C3:P3)

As well as the promotional work described above, Trustpower also ran direct mail and outbound sales telesales and door-knockers. Regarding telesales, the telesales team leader described how her team would approach their outbound sales calls which were run in tandem with the TVCs and other advertising:

“[When we call] we will talk about, ‘You may have heard of us, you may have seen us on TVs, billboards around the area’, and at which case the customer generally feeds back ‘Yes’, they have. And they will have some sort of discussion around the ad, ‘oh that was funny’ or ‘that was a bit cute’ or whatever... **we want to kind of get the conversation going without having to conduct census like questions. If we are going to do that we will immediately turn them off**... So, we kind of want to put it out there and allude to it, and at that point, most of the time people actually are quite receptive and say, ‘Yeah I have seen the billboard’ or ‘Yeah I did see that ad.’” (C3:P7)

As shown, the marketing specialists' aim at generating an emotional TVC increased awareness and consideration in the market, which assisted the telesales' team in their cold-call approaches. However, despite the thought put into the TVC, the telesales team still had to approach their customer calls with forethought and empathy, so as not to ‘turn them off’. For example, salespeople would engage their listener by subtly referring to the TVC, connecting the listener with the humour or other emotional response they had when they saw it. In other words, Trustpower was able to leverage off the likable TVCs by using subtle telesales techniques. Apart from the direct mail and telesales leveraging from the TVCs and the other promotional collateral, Trustpower's website also needed to display the offer accurately. As the digital channel manager explains, they needed to implement an integrated marketing approach to their website too:

“**We needed to structure the website** so that that deal can be bought and explained, and further information can be gathered. Then we need to work with marketing to get the collateral looking the same. The imagery... **so it all matches up**.” (C3:P8)

The digital channel manager indicated that the market needs to see the right imagery on the website to connect them to the promotion and the emotions associated with the TVC. To sum up the implementation phase, the marketing manager ensured that the TVCs and promotional material matched the creative brief. Her marketing expertise, leadership, and life experience knowledge were also evident in her project management skills, creative input, and the emotional responses from new customers that the sales staff described.

2.3.2.4 Appraising the marketing project

From the evidence collected, Trustpower's campaign was appraised by the specialists in seven main ways. These measures are market share; the number of sales; conversion rates; indicators of sustainable growth and shareholder value; evidence of emotional engagement in the promotion; effective social media response; and positive internal indicators among staff. After the launch, Trustpower increased their market share in both electricity and telecommunications. The marketing manager describes their increases in market share this way:

“We are doing damage, we know we are gaining customers from our competitor’s, we know we have upset competitors particularly with the \$49 unlimited broadband deal.” (C3:P3)

Apart from market share, Trustpower also appraised their campaign on the number of sales they are making. The marketing specialists record the number of inbound sales, which are callers responding to the campaign, as well as the number of outbound sales, generated by telesales and door knockers. According to the marketing manager, for the first time Trustpower’s sales team had more sales from inbound calls from their promotion, than their outbound sales calls:

“The last two weeks of sales results for this campaign... the company’s made more sales through inbound than outbound.” (C3:P3)

However, when asked about the primary indicator of growth in the marketing campaign, despite those provided above, the general manager added further measures:

“It’s sustainable growth and shareholder value. So that is not just about share, that’s **about margin contribution and customer lifetime value.** So, customers that we have that are on telecommunications and the energy product churn at half the rate of those who have electricity only. So, the more customers we get that have a broadband service, provided there is enough margin on those customers and their individual services. We are basically **building a customer base that has way more lifetime value than any telco or energy customer base separately.**” (C3:P4)

In identifying the principal indicator of growth from campaign, the general manager returned to Market's initial finding that customers with bundled products churn at a lower rate. Therefore, the main measure of success, by the general manager's estimation, was offering a bundled utility product whose attributes increased customer retention and provided an adequate margin of profit. These factors, according to the general manager, led to 'sustainable growth and shareholder value', which he lauded above monthly indicators of market share or number of sales. Nonetheless, the general manager, as well as other marketing specialists, also praised the emotions evoked by the campaign adhering to the Trustpower's audience:

“That ad is designed to be a couple of likeable people telling us a warm story that communicates warmth and care. But does it in a memorable way that people like and from what we have seen, I think we have got well over 100,000 YouTube views... **research on the cut through of the message is that it is actually much better than what we did last time.**” (C3:P4)

As described, the appraisal of the emotive response by the target market was researched, some of which consisted of YouTube views. With further regard to online media, the creative consultant, who was dubious of the effectiveness of online banners, believes that the campaign was a case-in-point for how they succeed:

“What has been interesting with this campaign, the \$49 campaign has been, you will hear **people saying that online banners don’t work** and are a waste of money. **The evidence has shown that that’s not the case in this...** If the message is correct, and the placement is correct, they can be very, very effective because people can click straight through to the website. So that’s been an interesting thing because I have never taken them seriously.” (C3:P5)

As well as appraising the campaign on its uptake, the campaign also positively affected staff within Trustpower. The increase and the ease of sales, and the feedback from customers who recognised the campaign appeared to have boosted the morale of personnel. As the telesales team leader iterated:

“The **feedback that we had from my team is more so positive than anything**. And that’s by talking to the customers and what they are saying about the ad, what they are saying about the billboards that they are seeing, what they are saying about what offers they are eligible for, so yeah, I think **it’s really, really positive. It’s really exciting.**” (C3:P7)

In sum, the campaign was appraised by a variety of indicators. These indicators included its market share; the number of sales; conversion rates; its sustainability and value; the emotional residue; online response; and positive feedback from personnel. To assess the project, the marketing manager used their marketing expertise, market intelligence, and organisation familiarity to analyse the results of the project. The results include figures from the electricity registry, a comparison of inbound versus outbound, as well as utility versus telecommunication sales, and customer conversion rates. Of particular focus were the sustainable growth, shareholder value, and the positive affectations Trustpower had garnered with their new metropolitan audiences. Based on these results, the campaign was considered successful on many fronts.

2.3.2.5 Marketing specialists’ knowledge within projects

Overall, from the planning to implementing phases in Trustpower’s marketing projects, the marketing specialists used aspects of the five knowledge domains identified in the literature review. However, their knowledge domains played a more significant role during certain phases than others. During the planning phase, marketing expertise, market intelligence, and leadership played major roles in the bundled utilities product concept and briefing both the marketing consultants and internal consultants involved.

Within the development phase, however, all five knowledge domains played significant roles. During the project’s implementation, marketing expertise, leadership, and life experience were

the most evident, as were marketing expertise, market intelligence, and organisation familiarity for the project's appraisal. As discussed, each knowledge domain played a vital role as the marketing specialists planned, developed, carried out and evaluated Trustpower's rebranding and launch of the bundled utility offering.

2.3.3 RQ2: The influence of marketing specialists' knowledge

The influence of the marketing specialists throughout Trustpower, as well as their external marketing consultants, has been analysed at three levels: the marketing specialist, firm, and market levels. The marketing specialist level discusses the marketing specialists' influence over one another and the resulting campaign. The firm level describes the marketing specialists' influence within Trustpower, namely with the board, senior managers, and other personnel. The market level considers the marketing specialists' influence on the marketplace, namely the target market in metropolitan areas as well as Trustpower's competitors and wholesalers. Therefore, the following section describes and analyses the influence Trustpower's marketing specialists in the following areas: among fellow marketing specialists and their campaign, Trustpower and its shareholders, as well as their target market and the power and telecommunications industry in New Zealand.

2.3.3.1 Influence at the marketing specialist level

From the data collected, the marketing specialists demonstrated influencing one another at the marketing specialist level in several ways. After launching the rebrand TVC, Trustpower's general manager met with the marketing manager, the strategic brand consultant, the creative consultant, and marketing personnel, to discuss themes for the campaign. After a two-hour workshop, the group decided an appropriate creative message for the campaign was, 'Good things happen when power and broadband get together'. During the deliberations, the plot of two people, who would embody two utilities, falling in love was proposed by the general manager. Although one of the main influencers of the campaign's creative concept was Trustpower's general manager, he led many of Trustpower's previous marketing initiatives and is considered a seasoned marketing specialist. In fact, after the rebranding campaign, the general manager relinquished himself as a major influence in Trustpower's marketing and hired the marketing manager to introduce a new dynamism. Apart from the general manager's input, other marketing specialists in the workshop played a part in developing a framework around the creative contribution, as summarised by the brand strategist:

“The magic in these workshops is when the creative spark happens, and **we come up with some definition and some wordage and some thinking, conceptual thinking** that goes, ‘Yeah, we can base our brand around this, that feels right for the market and where we need to go.’” (C3:P1)

With regards to the brand strategist, as a marketing specialist his influence on the rebranding campaign, which ran as a precursor to the campaign, was significant. Along with the creative

consultant, the two third-party marketing specialists applied successfully for the contract to rebrand Trustpower. As the general manager shows, their influence over the campaign began with their approach to the firm:

“Just his **ability to engage with us. He clearly was a listener**, not a guy who is going to come in and say, ‘do it like this’ or, ‘I’ve got the answer’. What he was saying was ‘**I know how to take you through the process, and I’ll make sure that we tap into the thinking and resources that are available** within Trustpower.’ So, it’s not going to be ‘I’m going to come and tell you what to do.’” (C3:P4)

As shown, the general manager recognised that a top-down approach would have limited, and perhaps a negative influence on the project and the other marketing specialists. Having described their credentials and the process they would use in the rebranding project, the third-party marketing specialists proceeded to deliver on their promise. The general manager summarises their approach:

“After the workshops, they pulled together everything they have heard and came back to us and said, ‘**This is what we have heard and based on that, we think this is the right direction.**’ So, they did at the point **provide us with direction and leadership... it was a combination of believing in the process from the outset and then the process meeting our expectations and the level of engagement with the people in the organisation being really strong.** So, it wasn’t, ‘We will go away and tinker and come up with something and tell you what it is’. It was very much a two-way dialogue.” (C3:P4)

Their leadership and collaborative approach resulted in the rebranding campaign being launched before the campaign, and both marketing specialists being contracted again as consultants. This creative direction was unlike previous conservative campaigns and was described by the general manager as ‘quite edgy for us’. The marketing manager agreed with the creative consultant’s Comic-Con idea, describing how she wanted to lead the campaign with a more ‘quirky’ tone:

“**Last year’s campaign was quite conservative** because that’s where we were as a company. This year, I’ve been able to, just **lead things forward a little bit more.** Because although we have New Zealand values, we don’t want to be dull and boring. We want to be just slightly a little bit different as well in terms of personality. So, **this year is moving us a little bit more quirky, a little bit more different.**” (C3:P3)

The general manager accepted the shift from a conservative tone for several reasons. First, both the strategic and creative consultant had worked on the previous rebranding campaign and had a familiarity with Trustpower. Also, although new to Trustpower, the marketing manager had gained the general manager's confidence by working near him and engaging in constant dialogue with him. Lastly, the general manager was an experienced marketer, plus he was involved and influential in the workshop run by the marketing specialists to develop a creative message. The general manager explained it this way:

“I think it worked because **those individuals had a long enough relationship with the company**, had been inherently involved in the development of brand strategy. So, **knew fundamentally what we were about.**” (C3:P4)

In developing and launching the campaign, the marketing manager worked with a plethora of people. In developing the campaign, the marketing specialists, particularly the marketing manager and the creative consultant, worked together to develop every detail relating to the TVC and other promotional collateral. As the marketing manager explains:

“I’ll spend a lot of time talking with our creatives... there will be conversations with [the general manager], conversations with peers, our company, particularly my conversations with my creative agencies; **that through the discussion and feeding off each other, it will all start to focus and focus and focus down to what the key message is** for what we are trying to do.” (C3:P3)

Once the Comic-Con concept had been approved, the marketing specialists began working on various aspects of developing the campaign. From the creative consultant’s perspective, he believed the success of the campaign was having constant access to the marketing manager, without having to go through intermediaries. Specifically, maintaining an efficient flow of information between himself and the marketing manager during work times, in the evenings, and at weekends helped manage the creative progress. The marketing manager described being involved in some of the major decisions made during the TVCs production:

“I sit down with the director and the creatives and watch all the audition tapes and **am absolutely involved in the decisions about casting, about music, about costume, about everything.**” (C3:P3)

The marketing manager participated in decision-making based on their experience with marketing, familiarity with Trustpower and its objectives, and by part-authoring the brief and script for the \$49 offer. Although the marketing manager was influential in many of the nuances and subtleties of the campaign, the creative consultant describes where a marketing manager may apply their influence less subtly:

“**Creatives sometimes need to be reined in**, and I include myself in that. I’ve got my enthusiasms, and I’ll come up with an idea I think is great. And **a good marketer will go ‘calm down, it doesn’t feel like our brand because...’**. ...It’s them having a really good feel for what the brand stands for, because **they live within that culture** and they bring a marketing perspective to it.” (C3:P5)

Apart from collaborating with various marketing consultants to develop the campaign, the marketing manager also has to coordinate the delivery of marketing collateral and communications in her team. Therefore, the marketing manager has to delegate the mundane, everyday work to others who have both marketing skills and can produce administrative outputs. As the marketing manager describes, she has the authority to determine and delegate responsibilities to the appropriate subordinate:

“If I just employed people who were marketing stars they don’t want to do that work, because they see [administration] as dull and boring. So, **I need a mix of people** who actually don’t who have a strong marketing background, but **those who have project management skills** and can get all of that done, **as well as people who actually can think marketing.**” (C3:P3)

The discourse above provides an example of the marketing manager’s positional influence over her marketing team. Apart from dealing with personnel within Trustpower, the marketing manager is also collaborating on the campaign with various marketing-related third-party agents. Speaking metaphorically about the variety of people the marketing manager influences, the digital channel manager compared her to one who leads an orchestra:

“**She’s a conductor.** She takes stuff from Markets and turns it into the advertisement that we see. Usually [she’s working among] a lot of different agencies, lawyers, agencies, printers, directors, TV people, billboard people, bus people.” (C3:P8)

As shown, the marketing manager and specialists were influential over one another regarding the campaign’s concept, production and designs, and the marketing-related third-parties involved. In brief, the marketing specialists influence was based on being appointed to the project and then their ability to administer their specialist knowledge and collaborative approach throughout the project’s development.

2.3.3.2 Influence at the firm level

As well as the marketing specialist level, the study also investigated how marketing specialists were influential at the firm level. The firm level refers to the board, senior managers, and other personnel, as well as Trustpower's strategy and branding. In terms of influencing personnel, both the brand strategist and creative consultant began unifying personnel around Trustpower's rebranding campaign before the marketing manager's appointment. As described by the brand strategist, unifying the senior staff at Trustpower began with workshops in which the branding of Trustpower was discussed and developed:

“Getting a **key group of senior people** together and taking them through this [rebranding] process. They’re involved in all the conversation, **they helped create this thinking.** They get enthused about it and what you come up with **ultimately encapsulates and defines their united vision** of where we’re going and why.” (C3:P1)

Apart from coming up with a unified vision and deeper understanding of their own company’s brand, the brand strategist explains another influence this process has on the firm’s personnel:

“**It’s more than [being enthused];** they are advocates for it, they are ambassadors for it, they’re selling it, they’re buying into it. There will be doubters and people going, ‘it’s a waste of money’, and they’re going ‘no sod off Terry, this is really important, and **this is what we’re trying to do out there.**” (C3:P1)

As shown, the rebranding process educates personnel on the importance of branding, provides an avenue to contribute to, and develop ambassadors for the rebranding. In other words, the

influence of these external marketing specialists helped further the market orientation of Trustpower. However, as the brand strategist explains, when the marketing manager was hired, the marketing specialist influence developed further changes within Trustpower:

“Then [the marketing manager] came into the mix and added other strings to the bow and that’s been really, really beneficial. Now, **with [the marketing manager] on board and [the general manager’s] vision, we were able to move things up into the sort of real campaign level stuff** which ... [For example, to produce the \$49 campaign, the general manager] had to go to the board and convince them to spend a lot of money, you know, it was a big leap... **They hadn’t done above the line advertising for ten years or something, you know, it was a big thing.**” (C3:P1)

Although the rebranding and promotional costs were not disclosed, the production of several professional TVCs, plus nationwide billboards, bus backs and other marketing collateral would be substantial. Therefore, the marketing specialists provided a level of confidence in the senior staff and the board in order for them to adapt to change and to take strategic and financial risks. Along with the changes to Trustpower's rebranding, the \$49 campaign also initiated changes in other areas of the firm. For instance, due to the success of the campaign, outbound sales were being overtaken by inbound sales, where customers actively responded to Trustpower's bundled utilities promotion. As the marketing manager explains, this change has influenced the way the sales team approach their work:

“The people who were part of the sales team who were doing the marketing, they very much felt that they were doing, in some ways, a pretty boring role. And **all they were doing was supporting the direct sales activity. Now marketing is far more important because inbound is far more important.** So, [Sales] can actually see that every direct mail piece that [Marketing] send out is actually having an effect on the number of sales that we are making. **I can show them figures each week for the number of inbound sales we made where people have quoted the TVC as the reason they made that inbound sale.**” (C3:P3)

As shown, the sales department had felt that marketing roles were support approaches to sales activities. However, since the \$49 campaign, the marketing department had quantified proof of branding and marketing communication's importance to attracting new customers. Therefore, the success of the campaign also influenced the departmental structure of Trustpower. As the marketing manager explains:

“**Marketing as a discipline didn’t exist two years ago;** it came through as part of sales. Now, it's existing as a discipline. **It is increasing in status and influence** within Trustpower because of the shift from outbound to inbound [sales].” (C3:P3)

However, on the downside of the marketing specialists’ influence, the success of the rebranding and \$49 campaign increased the logistical challenges other departments faced. For example, Trustpower had separate customer management systems for power and telecommunications, which hamper the effectiveness of both operational and frontline activity. The marketing manager explains:

“Operationally there are massive challenges, which we are working on as a company. But at the moment, simply all of our back-end systems at telco are different from the back-end systems in electricity, so there is no single view of the customer. You know, systems aren't as flexible as perhaps they need to be. **It creates challenges for online sales when we have got lots of different offers in the market.**” (C3:P3)

As described, these challenges may provide a bottleneck for further innovation in the bundled utilities offering suite unless they are addressed. Moreover, as the \$49 campaign was only one of several offerings provided by Trustpower across New Zealand, consequently the volume of challenges increased, as described by the telesales team leader:

“When we get an offer summary released and we know that there are multiple offers in one area, we're going, ‘Hang on a second, **is this going to relate the customer in a simple way?** I can see perhaps this and this happening.’ ... We also spend a considerable amount of time **looking at how can we overcome these objections, how can we simplify** what we are projecting to the customer. And then **if we are still having those issues and they are consistent, then we feedback to marketing or the markets team** so that we can look at, ‘is there another approach that we can take?’” (C3:P7)

Despite doing what they can to anticipate and overcome challenges, the telesales team leader believed it was astute to feedback to Marketing any customer objections that persisted. While impressed with the \$49 campaign, the telesales team leader believed far fewer concurrent offerings would simplify the sales and customer challenges Trustpower faced. However, while the operations and frontline departments faced challenges caused by the \$49 campaign, those in the Markets department were thinking of future initiatives. The manager of utilities products explains:

“The heat's on because the question now is, ‘**what's next?**’ What's the cool new thing we're going to do?’ You know, so and I guess the challenge is **can we come up with something that is as unique and will enable us to sing and dance about it to the extent we have with this proposition...** We need to go well, the bundle is now not only home phone and internet and energy; it's also rubbish collection and your mobile, and your insurance, and your water bill and whatever it is, who knows?” (C3:P2)

While there are other utilities that Trustpower might annex and add to their offerings, the manager of utilities products also believes the current proposition still had vitality. However, despite having an extended shelf life, other viable propositions need to be examined due to the lead in time they require before becoming an offering. However, the manager of utilities products describes how the current offering has given them breathing space to develop new product offerings in the meantime:

“Anyone that's on a contract will be waiting to get off the existing contracts, that's kind of a 12-month period you know. **My view is that there is a lot of time and momentum left in this campaign.** We've had a big initial spike and then we're going to ease back. The level at which we're going to kind of be able to continue to achieve sales and create inbound momentum as well as outbound sales, probably for a long time yet.” (C3:P2)

Apart from the influences described at the firm level above, the final one that emerged was the marketing specialists', specifically the marketing manager's, role in protecting the brand. There are two ways identified in the data that the marketing manager achieved this task. As the brand strategist explains, the marketing manager plays the brand guardian, who wards off anything or anyone that might damage the brand, and produces consistent brand messaging:

“The marketer in-house is usually the brand guardian. And that's really, really important to have someone who is a brand guardian. So that's everything from not having a logo bastardised on stuff, to ensuring that a multimillion-dollar campaign is sending the right brand messages out to the market which is consistent.” (C3:P1)

The creative consultant also spoke along the same lines about the specific importance the marketing manager has within the firm:

“The danger of not having that marketing within the company is that... all that knowledge about what the brand stands for isn't thought about or held by the organisation. And what can happen is that [the organisation] can go to an advertising agency **without a deep understanding of what the brand stands for and where it sits in the market, and a thousand other small but essential details.** (C3:P5)

Furthermore, the brand strategist also warns that without a professional and dedicated marketing specialist, the brand and the firm's communications will subsequently suffer.

“Unless you have marketing or brand-oriented specialists, the delivery of the visual brand and the communications around it tends to be pretty... bad. Because, real basic stuff like having a well-designed and realised visual identity; everything from the logo and the design system to the messaging and the imagery that is developed and **is based on strategy and thinking and articulates messages in the right feel, tone of voice and way to audiences.**” (C3:P1)

Overall, at the firm level, the marketing specialists influenced the senior, operations, and frontline personnel, as well as Trustpower's branding, sales, and marketing strategy. This influence included unifying and enthusing the firm, reshaping the marketing and sales symmetry, and providing logistical challenges as well as confidence in future propositions. During the project, the findings suggest that the marketing specialists had significant influence over the firm's personnel, the workflows, and culture. The marketing specialists' influence, particularly the marketing manager's, served to uphold Trustpower's branding and make sure its brand messages were consistent.

2.3.3.3 Influence at the market level

Trustpower's multi-utility launch had a significant impact on the power and telecommunications marketplace, being the first company in New Zealand to do so. The general manager explained that their capability to offer the \$49 product changed their competitive prospects remarkably:

“This whole idea of **becoming the first true multi-product utilities retailer and actually creating a category in New Zealand**. There are others in other countries, not as many as you think, and quite a few have tried and failed overseas as well. But in New Zealand, to be the only people doing that, it comes back down to basic marketing blue ocean/red ocean stuff, doesn't it? Who wants to be the electricity marketer with very, very, very red, bloody the ocean with sharks, with all that competition? **This is absolutely blue ocean stuff... we are creating a category of our own.**” (C3:P3)

As the provider of a unique multi-utilities product, Trustpower had a competitive advantage over both national and multi-national utility companies. Therefore, from the interviews, the marketing specialists appeared to influence several areas. These areas of influence affected their competitors, customers, and wholesalers. Concerning the competitors, the marketing specialists' influence affected several areas, including acquiring competitor's customers, creating a new utility category, generating competitor pushback. With acquiring new customers, the marketing manager describes how Trustpower can provide a low monthly price for unlimited broadband to entice new customers:

“We are competing by offering better value and better service. So, you know by being **one company supplying the telco and the gas and electricity we obviously have those savings in business overheads**. So, we can offer a better deal to a significant number of customers in those areas, than they can get through one company... Because this year's campaign on \$49 **we know that the other Telcos cannot offer it at that price, because of the wholesale costs of providing a broadband service.**” (C3:P3)

As discussed, to get the unlimited broadband offer, customers also have to receive their power from Trustpower. Therefore, the bundling of these utilities, plus the availability of gas and telephone by Trustpower, supplement the \$49 per month broadband offering. Consequently, as internet use has become ubiquitous throughout New Zealand, the offering drew a great deal of interest from the market. The marketing manager describes how the offering and its subsequent campaign is influencing the market place:

“Well, first of all, **we are seriously doing damage to some of our competitors** because of the number of new customers we are acquiring.” (C3:P3)

The manager of utility products describes how industry competitors, whether telecommunications or power, are reacting to losing customers and not being in a position to provide a tempting counter-offer:

“Our competitors, the telco **competitors are hating it**. Anecdotal evidence suggests that the energy retailers are hating it as well.” (C3:P2)

As discussed, bundling utilities, particularly power and telecommunications, served to reduce customer churning but it also created a new 'bundled' category in the market. The general manager discussed how once they realised the potential of bundling their power and broadband, they needed to strategise on how to maximise that potential:

“We’ve got I think two opportunities, one, is to **establish the category**. So, we have created it we can now establish it, and **then we can own it** and we really wanted to do all those things and we want to make sure that we are occupying the channels to market alternatives; the product and propositional alternatives. So, we are basically looking at ‘Where might somebody else come in here and how can we head them off in the pass?’” (C3:P4)

Knowing the impact their offering would have on the market, Trustpower tried to anticipate how competitors would respond and how Trustpower would then protect their newly acquired market share. The marketing manager also realised that competitors would push back, but was confident that Trustpower would, for the short-term, hold their ground due to the difficulties with instituting the offering:

“Obviously, **we have been enough of a threat or damaged them enough**, that Spark and Genesis are having to look at ideas of offering those services. So, we do believe it’s only a matter of time before some of the competitors do start to offer. How it happens...? We know **it’s taken us ten years to get to where we are with telco, it’s not an easy journey**, but one of the large electricity companies could buy a smaller telco, or Spark or Vodafone could buy out one of the smaller power companies, is probably the way it would happen.” (C3:P3)

As shown, although Telecommunication firms might fight back by acquiring power companies and vice versa, the \$49 campaign also had competitors considering more collaborative ways of entering the multi-utility market. However, before creating its own telecommunications facility, Trustpower had already collaborated with a Telco, but the partnership failed due to incompatibilities between both companies in service standards. The general manager describes how some of Trustpower's competitors are reacting to the \$49 campaign:

“**Our energy competitors are all sort of scrapping around** thinking how can they do something similar or what does this mean for them. And one of them, Genesis has just done a, what appears to be a market trial of cross-discounting off, where if you join up with Spark or Genesis you get \$10 off your power bill. \$5 off a month for your Spark broadband bill. But in order to take the offer you’ve got to sign up to each of them separately... it’s not a joint bill, **there is no shared customer service or common service it is just completely... un-joined up**, so it’s the only response we have seen so far.” (C3:P4)

In short, the offering has put pressure on some competitors to respond immediately. However, responding in haste is likely to cause errors.

Additionally, apart from trying to become the bundled utilities market's second mover, other competitors have taken a litigious approach. The marketing advisor provided an example of how some competitors reported Trustpower as their advertising collateral was missing some caveats:

“**We have had complaints from Vodafone and Spark about our offer and the way we present it**. Which then created a change to a marketing material where we didn’t specifically mention our fair use and traffic management policy on our early marketing material when we were testing it last year I think. Where now that’s plastered all over

everything. From my personal opinion, **they are looking at what we are doing and going, ‘...We’ve got to pick this apart and try and do what we can to stop them taking all of our customers.’**” (C3:P6)

The influences described above, including acquiring competitor's customers, creating a new utility category, generating competitor pushback, had a significant effect on the industries concerned. Moreover, as bundling products appear to retain customers, other industries may also be affected if Trustpower decides to sell other services such as insurance, mobile data or rubbish collecting.

In addition to its competitors, Trustpower had also influenced its target audience. As discussed, the campaign was designed to evoke an emotional response from its audiences, causing them to join and remain with Trustpower. Specifically, the fanciable Comic-Con ad and its price-point were designed to attract new customers; the bundled utility package was developed to keep them. Regarding the emotional impact of the Comic-Con TVC and its ensuing promotional collateral, the marketing specialists were very purposeful in how the campaign would influence its audience. The creative consultant explained how the emotion kindled from the TVCs would switch to Trustpower as well as be triggered by other marketing collateral:

“With this campaign, you put an ad out there, **a very emotional ad on the TV, that makes people like the brand and feel very warm about it**, and you are preparing them for it. So, when you put the offer on an online banner, where you can’t get a lot of emotion, **they transfer the emotion that they’ve got from the TV to the online banner**. It’s certainly an, ‘oh that’s Trustpower, I like them’. And that’s to me one of the reasons, **one of the ways you can make online advertising work well is by doing the big emotional job up front in a mass medium**, in basically a moving image.” (C3:P5)

This strategy appeared to work well. During the focus group, the telesales team leader described how their outbound sales team would struggle to convert new customers based on a low price point alone. She described how the TVCs and their popularity helped to establish trust in new markets and, along with the low price point, convert calls into sales:

“It’s very much trusting from our perspective, so if we are going into a fresh area like we have done with the metros, and nobody has heard of the brand or the company, it makes it really hard to establish that trust. **People only buy from people they trust, so my guys first of all have to leverage off something.**” (C3:P7)

Along with overcoming questions about trusting a new entrant into the metropolitan areas, the lower price was also persuasive in making sales. As the marketing manager explained, the price-point and the bundled utility product provides a win-win for Trustpower and its customers, which proves a vital influence over its market:

“Significant saving for those customers. **They are more valuable to us in absolute terms, but we are also much less likely to lose them as customers** which obviously has a knock-on substantial business benefits.” (C3:P3)

Furthermore, in terms of influence, the bundled utilities product deepens the relationship between Trustpower and its customers. Consequently, as the manager of utilities products explains, this bond causes customer loyalty and greater lifetime value for Trustpower:

"A view, and a belief that actually the more products that we have with our customers, **the deeper the relationship, the stickier the relationship, the better lifetime value we have out of those customers.**" (C3:P2)

Finally, the manager of utilities products believed that wholesalers and companies that are laying fibre cable are optimistic due to the increase in competition among telecommunication providers. As he explains, it has little in the way of immediate benefit to them, but provides some assurance that they will achieve their goals around their rollout and a stronger relationship with Trustpower:

"My gut feel is **the wholesalers are happy** because they're seeing that Trustpower is growing. You know, so they're encouraging it... It doesn't really help them, but they like to see growth and competition in the marketplace. So, from a relationship, our relationship with them, you know they're seeing us grow quite a lot. So, you know they're happy for us. And on the fibre side... [the] **local fibre company in Tauranga and Hamilton and a few other areas, they're happy** as well because, you know, us helping drive the momentum in that side as well. And so, they've got targets, [and want to] hit certain numbers to make sure that the rollout is successful with fibre, so they're happy." (C3:P2)

Findings regarding the marketing specialists' influence on the market strongly suggest their influence was dynamic and impactful, affecting their market in several ways. One of the main influences the campaign leveraged from was being the first-mover in multi-utility products in New Zealand. This capability provided Trustpower with the confidence to re-enter the metropolitan markets they had abandoned ten years prior. However, while bundling provided a low price-point and convenience for customers, the marketing specialists guided Trustpower toward developing an emotive campaign to increase customer receptiveness, particularly in new markets. Apart from its new metropolitan customers, Trustpower also attracted attention from both power and telecommunication companies who were losing their customers to the \$49 offering. As the bundled utility product that Trustpower provides is difficult to imitate, competitors responded by seeking to develop partnerships with each other, or attack Trustpower litigiously. In short, Trustpower's marketing specialists influenced both Telco and Power industries, the metropolitan markets they aimed to reach, and the wholesalers of fibre cable who are enjoying a competitive marketplace.

2.3.3.4 Trustpower's marketing specialists' influence

Throughout each phase of Trustpower's marketing projects, the evidence points to several ways the marketing specialists were influential. First, the marketing specialists recognised Trustpower's desire to penetrate New Zealand's metropolitan markets, the unique offering the \$49 bundle presented, and the market's likely uptake of it. Also, the marketing specialists were

influential due to the knowledge, access to further knowledge, as well as the mentoring and experience they had. However, apart from their knowledge, another critical key to their influence at each level was the processes the marketing specialists undertook at the marketing specialist, firm, and market levels. The marketing specialists were in constant communication with each other, their senior managers, various department heads, and various third-party contractors. These communications ensured the ideas, logistics, and other details of the project had undergone thorough review processes with the relevant stakeholders. Furthermore, the marketing specialists' professional approach to their work and courteous manner with others also aided in their influence, particularly at the firm level. Therefore, by offering the unique bundled utilities at a low price and developing ideal promotional and organisational resources, the marketing specialists achieved the market penetration goals set for them.

2.3.4 Summary of the Trustpower case

Overall, the marketing specialists' knowledge proved influential at the marketing specialist, firm, and market levels for several reasons. First, the marketing specialists were selected for the project because of their field of expertise and prior experience. In other words, regardless of the marketing specialist, their knowledge had proven valuable in many past projects. For instance, the marketing manager's previous project and financial management, and record of diplomacy with her clients provided senior management confidence in her project responsibilities. Second, the marketing specialists, particularly the marketing manager, placed themselves in a central position concerning both idea-flow and workflow. By placing themselves centrally, they were able to influence Trustpower's personnel, third-party consultant and production teams with their knowledge and ideas. Third, the marketing specialists, in particular, the marketing manager, would dispense with their central positioning and regularly contact or visit with various departments within Trustpower and other stakeholders for their views. By adopting both a central position and a roving capacity, the marketing specialist was also able to gather relevant knowledge from primary stakeholders promptly. As a bundled utility offering, the \$49 campaign would require both the input and the compliance of every department within Trustpower. Finally, the marketing specialists were continually considering their market audience, including their service needs, motivation to switch utility providers, and likely emotional responses to each market output. By anticipating the market's responses, including their competitors', the marketing specialists were able to adjust aspects of their project, including Trustpower's service behaviours, to maximise their projects' effectiveness. Therefore, by being experts, by adopting centralist and mobile management styles, and adjusting their projects to maximise market responses, the marketing specialists led Trustpower to achieve its organisational goals.

2.4 InterCity Group

2.4.1 List of evidentiary sources

For the InterCity Group, one-on-one interviews were conducted with their CEO, the marketing manager, a board member, one of the general managers, and a third-party marketing consultant. The five semi-structured interviews were audio recorded and averaged 109 minutes each. The interviews were transcribed and double-checked by the researcher, with transcripts for the one-on-one interviews averaging around 21 A4 pages each. The focus group consisted of staff from sales, operations, marketing, administration, and frontline, whose audio recorded was 88 minutes long, generating a transcript of around 35 A4 pages. The notes in the marketing manager's reflective journal, minus the questions the researcher asked, totalled 191 words.

Multiple documents, artefacts, and digital files were obtained from the InterCity Group. InterCity Group's digital files consisted of seven jpegs of the various old and new InterCity Group's logos. Jpegs of the buses' new paint concept and marketing posters. Version 1 of the marketing consultants brand blueprint, consisting of eight slides. Version 1 of the marketing consultants brand blueprint, consisting of 78 slides. Brand concept and livery designs and a market test report made up of 13 slides. Physical artefacts consist of two internal marketing Extra Milers newsletters; a Drivers' Standards and Procedures booklet; The Road Ahead DVD presented to staff discussed the rebranding and showed a bus being resprayed with the new livery. The interview and focus group transcripts, the marketing manager's reflective journal and the marketing artefacts were examined for evidence relating to the research questions about marketing specialist knowledge and influence. Therefore, the following section addresses the research question *RQ1: How was marketing specialists' knowledge used when planning, developing, implementing, and appraising the marketing project.*

2.4.2 RQ1: The marketing specialists' knowledge

The InterCity Group's rebranding project drew primarily from the specialist knowledge of two marketing specialist sources: InterCity's marketing manager and a third-party marketing consultant. Other third-party marketing agencies were used to conduct the initial survey and develop the re-brand livery design. At the time of the rebrand, the marketing manager had been working with InterCity for ten years, as was previously an award-winning sales representative with Coca-Cola Amatil. Despite not having a business degree or any tertiary qualifications, the marketing manager believes that he won the role for several reasons. First, the interview process with the then CEO was informal, more like a philosophical chat, where each expressed their views on branding, marketing, and selling. From working with Coca-Cola, the marketing manager's views were modern and internet savvy, contrasting with the traditional marketing views the CEO usually heard. Elements of the marketing manager's sales achievements and

being a 'geek at heart' resonated with the CEO as the marketplace was shifting increasingly online. Although he did not have a marketing or business degree, the marketing manager suggests his extensive travels and 'university of life' experiences may have had some appeal with the CEO. Therefore, the marketing manager's initial role was the manager of marketing and sales, but he is currently the general manager for marketing and online sales. The marketing manager explained his early days transitioning InterCity Group into a predominately online business:

“I relished the opportunity to get in there and do stuff. And within a very short space of time, our retail sales became less important, and the internet became more and more important. That's for me, where things took off for me... **I think in terms of an online marketing environment more than anything else.** That's our business. That's where we talk to our consumers.” (C4:P1)

In brief, the marketing manager's sales skills and his recognition of InterCity's need to overhaul its traditional retail methods directed him toward introducing an online marketing approach. Therefore, although starting in a sales role, the online marketing aspect of the role quickly became his primary role. The current CEO describes the marketing manager's progress in the following manner:

“[Our marketing manager] started more in a pure sales side of the industry to like representing products from InterCity into the wholesale channels and the offshore channels. And at some point, in his career progression, probably about the time that **the online market, the digital market was becoming more relevant, [he] developed an interest in that and some expertise** and switched across to focus more on the online side of delivery of marketing. **And of course, the branding and marketing that goes alongside it.** So, he shifted ..., you know, he's in that position which is a useful one, I think. To have some direct selling experiences, from a pure sales experience and then has transitioned into more of a marketing role.” (C4:P2)

However, despite his history in sales and penchant for online marketing, the marketing manager realised he needed help leading InterCity Group and its various franchisees through a rebranding process. Therefore, after advertising for a marketing agency to assist, the marketing manager selected the marketing consultant whose pitch was the most salient. The marketing consultant, a brand strategist, had founded and worked in an advertising agency for over a decade and several years worked in his current role as a freelancer. After discussing his previous rebranding projects, and upon hearing about InterCity's franchise structure, the marketing consultant recommended that they conducted rebranding workshops at major InterCity depots throughout New Zealand. The consultant's workshop pitch won due to its potential to open dialogue among franchisees and personnel, develop organisation-wide service benchmarks, and simultaneously create commitment toward the rebrand. Furthermore, the consultant had a rebranding portfolio which demonstrated his wide experience, various approaches, and success in these types of projects. Another marketing specialist involved was the creative designer, whose primary role was designing the project's livery and logos based on

the feedback from the workshops. A digital marketing and social specialist was also involved and had been with InterCity for two years at the time of the interviews. The other participants in the interviews and focus groups did not attest to a marketing background.

Overall, the marketing specialists' knowledge, specifically the marketing manager's and the third-party marketing consultant's knowledge, had the following qualities necessary for InterCity's rebranding project. As shown, the marketing specialist's knowledge was primarily his organisation familiarity, online marketing expertise, market intelligence, leadership, and life experiences. Whereas the marketing consultant's knowledge was primarily in marketing expertise in branding and advertising and in leadership, where he had undertaken multiple rebranding projects before InterCity. Working together, the pair used one another's knowledge to carry out all stages of InterCity's rebranding project.

2.4.2.1 Planning the marketing project

From the first day of his job, the marketing manager disliked InterCity Group's logo and livery design, feeling it was, even then, tired and unconnected with the services they provided. After his first decade, having developed their online marketing, the marketing manager felt it was then time to give the branding device a more modern look and feel. Apart from the tiredness of the branding's look and logo, a low-cost competitor had also arrived and was capturing some of their business. Despite these marketing portents, the marketing manager explains how challenging it was to introduce the topic of rebranding:

“I think from the day I joined, probably, **I had a sense of InterCity just being literally old, tired.** And this is going back ten years ago now, with big block stripes and it looked government owned and you know there was a bird as it's device, and never understanding why there was this bird. **But [the response from others was] you know, 'It's not broken just leave it'.** You know, ‘focus on something else’. It wasn't important to our shareholders, because as far as they were concerned it wasn't broken. As far as our networks are concerned it's brilliant. Operationally it's brilliant. And look at our passenger numbers, they're brilliant. **[But I cared about what] our consumers thought. It mattered to me.**” (C4:P1)

Therefore, sensing that the InterCity brand was underperforming, particularly in terms of its livery and cohesion of values, the marketing manager began planning a major rebranding project. The marketing manager approached the board and convinced them that, despite the current branding's seemingly satisfactory outcomes, a survey should be conducted on how customers felt about their services. Next, having gained the board's approval, the marketing manager contracted an external market research company who surveyed around 3000 people. The results confirmed the marketing manager's and some other senior personnel's suspicions that, although customers had a strong sense of loyalty to InterCity, that the livery was perceived as outdated. The InterCity Group's CEO discussed the results of the survey further:

“A lot of the stuff we got back was that it was **a very trusted brand, a very solid, family-based brand, if you like. It's synonymous with New Zealand**, but perhaps the one observation was that it felt, perhaps a little bit old and dated in the way it projected. So, I think one of the interesting analogies that was drawn by someone, who I can't remember who it was, was that **it felt like a familiar old uncle** that, you know, you loved and trusted. **But it was perhaps just a little out of date in terms of how people saw it.**” (C4:P2)

Along with highlighting the need to refresh InterCity's livery, the survey highlighted other areas as well. When considering the survey's results, senior personnel were reminded of the various dimensions of the target audiences' perception of InterCity. For instance, apart from how the livery looked, senior personnel considered how their level of service was perceived, as well as their brand identity, mission statement, and values. The growing brand awareness across senior stakeholders provided the marketing manager with an opportunity to contact another agency to pursue a company-wide rebranding exercise. One of InterCity's general managers remembers this stage of the rebranding process this way:

“**The original approach was pretty narrow.** It was hey, maybe we could just change the paint scheme on our coaches and change the look and feel on our websites. **But as we started digging into it, we realised that actually a brand is much more** than the green or the blue paint on the side of a bus. It is, it encapsulates a consumer's perception of you as a business. And the visual aspect that it's just one dimension. But the other dimensions include the level of service that we deliver, are equally if not more important. And so that lead us into quite an intense piece of work which we had facilitated for us by a creative company. And they assisted us with putting together a brand identity for InterCity and mapping out the mission statement and the values that underpin that. And so, **it really turned from being a brand refresh exercise into an examination of what our values are and what our mission statement/s are and much more** encompassing than that initial narrow perspective.” (C4:P3)

As shown, what started as a survey of their target market's perceptions of their company became the impetus to launch a major nation-wide project. Along with new logos and livery, the project was then planned to refresh and consolidate InterCity's mission and values with its personnel and several non-InterCity franchisees. As the marketing manager explains, the results and timing of the survey provided him with leverage to develop a comprehensive rebrand:

“That was the start of the project. That's where the whole idea came from. We went into the research reasonably confident about what it would reveal. We had our own suspicions on it. **We felt that the timing was right to be able to push it up to the board.** We just got through GFC. We were conscious that, that someone like nakedbus.com as a competitor that they weren't going away. This is pre-Mana [another low-cost competitor]. We didn't even know Mana was coming. A lot of things in terms of business had been ticked off. It was the right timing. **It was the biggest thing we had put up to the board in a long time. Everything was on the table.**” (C4:P1)

As shown, pitching the rebranding processes to the board and senior managers was, in itself, a marketing exercise. By using the survey as leverage, the marketing manager had planned how to take the financial outlay and logistical hazards of a major rebranding project from dismissible to appealing. Part of the appeal was the encompassing and collaborative nature the rebranding

process they had planned to undertake, as well as several underlying issues it was prepared to address. For instance, as the marketing manager explains, the InterCity Group struggled with its identity due in large part by its makeup of several franchisees:

“There was so much confusion across the organisation... **this rebrand gave us the opportunity to do a real purge across the country**... In terms of the whole brand process, **it was about simplifying and being clear**. In our own minds, as much as the customers' minds, who we were, who we wanted them to think we were, and what we wanted them to think about us.” (C4:P1)

Furthermore, the ‘purge’ of the ‘whole brand process’ was planned to include revamping the procedures and service standards for bus drivers and other customer-facing services. In other words, the marketing manager planned to address and unify the level of service to shore up InterCity’s premium offering and pricing. The digital marketing and social specialist put it this way:

“**If we had just upgraded all of the buses and left everything else the same**, then we would have a bunch of **really nice buses and people not catching them** because we have grumpy drivers or... customer service representatives who don't care.” (C4:P4)

Hence, as the marketing specialists proposed, the board and senior managers recognised a thorough rebrand required personnel from the franchisees to attend the workshops and engage in them. Therefore, the board, some of whom were the main owners of the various franchises, approved the marketing plan. With the board’s approval, the marketing manager could begin developing the next phase of the rebranding project.

To plan InterCity’s rebranding project, the marketing specialists demonstrated several knowledge domains. The marketing manager showed marketing expertise, market intelligence, organisation familiarity, and leadership by recognising the need for a rebrand and the likely resistance it would create. His leadership was also evident when he, on the advice of the marketing consultant approached the board and convinced them to undertake a comprehensive rebranding project. The marketing consultant's knowledge was also evident in the planning phase in terms of marketing expertise and leadership. It was the marketing consultant, for example, who recommended they run workshops at InterCity's depots throughout New Zealand. Whereas the marketing research company demonstrated marketing expertise, particularly in the market research area, by conducting a major survey and providing Trustpower with its findings and recommendations.

2.4.2.2 Developing the marketing project

Once the marketing manager had permission to conduct the workshops, he and the marketing consultant who won the contract began developing the project. As discussed, developing the rebranding project began with the marketing specialists holding workshops to determine InterCity Group's service delivery standards and core values. As the marketing consultant

explained, the first workshops were with the senior managers and board members, where some brand insights on InterCity began to crystallise before the regional workshops began:

“We ended up... **spending about eight months doing workshops**. So, we did the **first one with the management team, and we did one with the board** as well. Right from the outset. Which was a good session. All pretty robust session, people with very strong views. Not necessarily agreeing about everything. No, it's all good. And **we started developing a bit of a hypothesis around some values, and what we stand for, and where we're placed in the market**. And then we went out and **we ran workshops with groups of drivers and people from the franchise**. And we did those all over the country.” (C4:P5)

As shown, some views from senior staff and board members in the early workshops were strongly asserted, and some disagreement ensued, although the marketing consultant seemed pleased with the outcome. Utilising their feedback, the marketing consultant developed some hypotheses regarding the values, identity, and competitive position of the InterCity Group. Regarding the disagreements, these topics were also likely to arise around the country so the marketing consultant, being forewarned, would be better prepared to handle them. Next, the marketing manager describes how they conducted the workshops and why they were essential to the rebranding project:

“[The marketing consultant] essentially lead the sessions in every group. And it **really helped having someone external come in with no baggage whatsoever**... I would do a little skit you know, things to begin with and talking about what we were trying to achieve etc. And then we'll be going to **a bit of Brand 101**, ‘What is a brand? A brand isn't a logo. What colour stuff?’ We talk about some famous brands and we would ask people to talk about a brand that they liked. And then, from that we would tease out and go, ‘Oh why do you like it?’ ‘I like it because it's this’. And that really demonstrated to people that **we like a brand because of some emotional connection**, not just because you like the look of the logo. And I actually found a lot of people enjoyed the sessions because they walked away and felt like they learnt something. And **they kind of feel that, ‘Oh I kind of get now all those, what you guys do there.’**” (C4:P1)

As shown, based on their experiences in facilitating these workshops, the marketing specialists used several approaches to assist participants in contributing to the workshops. First, the marketing consultant checked the participants' prior understanding of branding and proceeded to fill the gaps in their understanding. Here, the marketing consultant did not assume that non-marketers understood the concepts of branding and marketing but guided their understanding of how and why branding is important. By educating non-marketers on the importance and purpose of branding and how it affects people, the participants then felt as though they are contributing to a worthwhile exercise. Second, the process helped facilitate non-marketers to become what academic literature terms market-oriented, to consider the needs and feelings of their customers before, during, and after their service experience. Third, seeing both the purpose of the workshop and their contribution to it, the participants became more invested in the rebrand, likely reducing their resistance to any changes. Forth, the workshops allowed personnel to vent their concerns about service standards, whether health and safety or route and timetable

related, despite these issues not being on the agenda. Lastly, the participants began to understand and appreciate the significance of marketing as a discipline and the marketing manager's role. Finally, as the marketing manager discusses, the whole exercise helped develop ambassadors for the rebrand:

“It’s got to be a two-way partnership. **We have to bring everyone together with us.** Because... there was no way we could just have rocked up, three months later having engaged with an agency to say, ‘Here's what we're going to look like and by the way here's your new uniform’. If we had done that it would have failed, and it would have fallen flat... **It needed to have buy-in from ground zero.** So those sessions enabled us to be able to do that.” (C4:P1)

Overall, the rebrand was also an exercise in both unifying and market orienting InterCity’s franchisees. Moreover, the contributions provided by the workshops across the country were critical to shaping InterCity’s service standards and livery design. Interestingly, the contributions regarding service standards offered by stakeholders around various workshops typically correlated, despite the difference in the participant’s franchise, location, and type of work. As described by the marketing manager, observing that the findings were going to be congruent across the organisation was fascinating:

“What was really interesting and what was really satisfying for [the marketing consultant] and I was **that every group said the same kind of things.** In terms of who are we, what do we do, what do we do well, what is important to us, what's our company, what should we stand for. It was almost the same. And we would, during each session we almost look and smile at each other.” (C4:P1)

In discussing his methodology used within the workshops, the marketing consultant provided several interesting insights. First, although dealing with ‘hard-case’ bus drivers and other staff, the marketing consultant would strive to create a creative brainstorming session to minimise unexciting conclusions. Apart from teaching them about how branding is more associated with emotions than logos, the marketing consultant used humour, fun, and debate in order to spark creative thinking. As shown, the marketing consultant encouraged all kinds of input to stimulate and inspire the participants' contributions. Otherwise, it was up to him to phrase the company's new mottos:

“You can apply any methodology you want, **but if the muse and the inspiration and the insights don't bubble away and generate something out of that, you know, you end up with something ordinary.** And if it's too ordinary you keep working on it. And so, **the approach has got to be fluid, got to be a bit elastic because it's creative thinking...** this process is about doing it and having the people involved as it is about the definition that comes out. Because they feel that they were involved in it. And even if they might not... employees, 100% agree with the exact wording or some aspects of it ‘Well, I was part of it, it was the best we could come up with; I couldn’t come up with anything better.’ You know it works like that. And you know also it's very rare you run a session if you follow this basic approach and it’s well facilitated, and you have some laughs and it's fun and you have some robust debate... If you don't, **it's very rare running these sessions where you don't end up with some good, good stuff.** It does

happen from time to time. **When that happens, our job is to go away and go right we've got to come up with some phraseology and take it back to them.**" (C4:P5)

Generally speaking, a workshop is completed once there is an overall consensus on the findings. In InterCity's case, the phrase 'Go the extra mile with a smile' was a result of the first workshop, with other values and cultural benchmarks decided upon in subsequent workshops. As these were 'rolling workshops', the marketing consultant shared the findings of previous workshops with participants and asked them if they agreed with or could improve on them. When asked if priming the participants with the results of previous workshops was a good idea, the marketing consultant responded:

"If you went into everyone fresh and you didn't show them the journey you had been on, and how you actually have got to where you are, you would never finish a project. Because you would end up, if you did 10 workshops you would end up with 10 different ways of saying the similar sort of thing. **It's a consultation and getting people on board as much as an exploration thing. It's a balance of the two. And it's something that I worked out** through from just doing them over the years." (C4:P5)

As shown, the rolling workshops are a combination sharing the values and ideas previous workshops had decided upon, as well as exploring new perspectives from the current participants. In this way, participants in each of the workshops could evaluate their contribution against the perspective of previous ones. Although the first workshops appear to miss appraising the contribution of other participants, the rolling workshop procedure appeared to cement the rebranding initiative across the organisation. As the workshops held in depots began in the South Island of New Zealand and travelled north, the Auckland workshops were some of the last held. A long-time bus driver in the focus group, who was antagonistic toward InterCity needing a rebrand, provided his perspective of the workshop he attended in Auckland:

"They actually brought out what the proposal was and some of the suggestions that had already come forward from other groups, focus groups. They had already done other focus groups already throughout the whole country. And so, **we now had got to have our say as to what we thought would be good** to put in. And to also look at what else had come through. And overall the comments and feedback from that is where the original has come out of. Everyone did get a chance, even right down to the driver... But that, I thought was very well done, **we had a valuable input at the time.**" (C4:P6)

As shown, the inclusion of drivers in the consultation process, whether they provided theirs or agreed with a previous statement, positively impressed this long-time bus driver. In fact, despite being one of the last workshops, the bus driver felt their input had value. By providing an avenue to express their perspective, approval, or disapproval, the rolling workshops were a suitable approach to gain consensus on the project from stakeholders across the Group. The marketing consultant sums up the purpose and process of running the workshops in the following way:

“It's really simple. No matter what project you work on, **it's the alchemy of having a bunch of people** out of their normal environment and processes of what they do. Being gently **taken through a structured but not particularly complicated process**, stop and think about their customers, their business and what they really want.” (C4:P5)

As shown, the workshops provided InterCity stakeholders with an opportunity to take a fresh look at their day to day work and contribute prudently to its rehabilitation. From this perspective, the participants were primed to look at their roles more objectively and idealistically. This approach caused personnel to benchmark their job descriptions with ideas that their employer would be pleased with but would find it difficult to impose. The chair of the InterCity Group's board described the results of the workshops in the following terms:

“It was, if you like, almost **a cultural stocktake of the company.**” (C4:P7)

To summarise and embody the findings of the workshop, the marketing specialists used a marketing tool with which participants compare their company with another entity. This semblance activity typically uses brands that participants are very familiar with, such as cars or alcoholic drinks. The CEO explains how one participant used this activity to describe the InterCity Group as a member of the family:

“I think one of the interesting analogies that was drawn by someone, who I can't remember who it was, was that it felt like a **familiar old uncle that, you know, you loved and trusted. But it was perhaps just a little out of date** in terms of how people saw it.” (C4:P2)

Taking the analogy further, the marketing manager felt that, apart from being ‘a trusted uncle’, a sense of being heartland New Zealand was also part of the InterCity’s character mix. Also, based on the feedback from the workshops, while being a ‘trusted uncle’ was a good fit, the participants wanted to see his persona modernised. The marketing manager explains:

“We're this New Zealand company. **We are heartland New Zealand, ‘cause that's where we are, we are everywhere.** And just, it felt so good; goose bumps thinking about it again. That's what it was like looking at it. Some people were kind of like, oh no it needs to be more modern. But it just, it felt really secure and stable. One of the things that came out of that brand, those brand workshops is one of the ways that we described what we wanted to feel like. We wanted to be almost like that trusted uncle. I know it's a weird thing to talk about, **but we went, a trusted uncle feels really good with us.** The trusted uncle who you would go, ‘Oh, yeah no, uncle John will drop me off at the airport, Oh, no uncle John will pick me up after the party’. And you just knew he was safe as houses. And he was a really good guy, who would do anything for you.” (C4:P1)

Certain elements of the rebrand, however, were not discussed in the workshops with the participants. Responsibility for these elements, such as the design and colour of the logo and livery, was given to respective professional consultants. This constraint was due to the level of knowledge participants had been appropriate to the task at hand. For instance, while phrases such as, ‘Go the extra mile with a smile’ and ‘Do it once, do it right’ were used to inform the

creative process, the actual livery designs were left to professional designers. However, to maintain a sense of democracy and deflect any sense of imposition, the marketing manager surveyed both personnel and InterCity customers to select the livery's final design and colour. Here the marketing manager recognised a specialist best develop the logo design, and that consensus had its place in selecting the appropriate logo, rather than developing one. In other words, the marketing specialists considered strategically which decisions participants and stakeholders would make, in order to maximise their stakeholder's commitment and produce a professional result. To conclude, one of the general managers describes the cost of contracting the marketing consultant and conducting regional workshops:

“And that was a significant amount of money, but **pales in comparison to what we end up spending on the execution.**” (C4:P3)

Overall in the development of InterCity's rebrand, the marketing manager and consultant demonstrated their marketing expertise, organisation familiarity, leadership, and life experiences, particularly during the workshops. The life experiences of the marketing specialists helped them find the right tone in which to collaborate with the various stakeholders they encountered. Although the marketing manager had been with InterCity for ten years at the time of the workshops, his and the marketing consultant's organisation familiarity grew significantly during this phase. Particularly as the marketing specialists visited and heard the perspectives and ideas provided by the various InterCity stakeholders across New Zealand. Conversely, the marketing expertise or more correctly, the market orientation of attendees at the workshops would have increased as well. During and after the workshops, the marketing specialists demonstrated marketing expertise by being able to critically analyse the phrases, such as ‘Go the extra mile with a smile’ being offered. In their analysis, they considered the internal marketing value of multiple phrases, ideas, and feedback to determine their saliency to the rebranding's objectives. Finally, the leadership styles they demonstrated conformed to the context in which they found themselves. For instance, when a top-down or autonomous style was required, the marketing specialists would lead this way. However, the dominant style the marketing specialists adopted, as recommended by the marketing consultant, was democratic in order to gain consensus from, rather than alienate, InterCity's stakeholders.

2.4.2.3 Implementing the marketing project

Implementing the rebrand became a series of planned steps. Once the results of the workshops were consolidated, and the marketing specialists were satisfied with the values and identity development, and that stakeholders were aligned, a creative agency was approached. As the marketing manager explains, the results of the workshops became a brief for the creative agency to develop a new ‘look’ for the InterCity Group:

“Once we had done all that work, and we were really clear... what we felt we wanted to be; **what the organisation felt it wanted to be. And how we wanted the market to think of us.** That was before we even went near any creative. **As soon as we had done all the work with the staff, that's when we went and sat down with the creative guys...** And went, ‘Okay, here's what we've done, here's what everyone says, we now need to evolve, **we need to evolve our look and we need it to be in conjunction with [these findings].**” (C4:P1)

Using the results from the workshops, particularly the feedback on how the InterCity Group wanted to be perceived by its market, the creative agency developed several options. The options ranged from conservative to ‘edgy’ to give the decision-makers some scope and choice in the final design’. The winning design, made up of tiny New Zealand icons, which sat in the middle of the conservative to edgy spectrum, was chosen and presented to the board. The board considered the design approvingly and, on the marketing specialist's recommendation, decided to survey its customers to validate the logo choice and select the most appropriate colour. Around March of that year, the livery was decided upon, and the board and senior management began discussing repainting buses, with options on a one, two, or three-year rollout. However, regarding a long-term rollout of repainting buses, the marketing manager had this to say:

“If you try and make me do this in a 2- or 3-year rollout we might as well throw our hands up now and just forget about it. It needs to be, you know, like ripping off a band-aid. You need to get in there and get it done. **And we've got to let the market know who we are come summer.** So that was our goal and we knew we had to get the fleet done.” (C4:P1)

As a result, having settled the InterCity Group’s new brand values, identity, and livery design, the marketing manager explained how he was left to project manage the entire rollout process:

“We knew we had a window of opportunity to get the majority of the fleet done, bear in mind it's not easy to paint a bus, you don't just do it in a day. Plus, you know, uniform, all the other bits and pieces that **go along with a rebrand. I mean it's just, I have never worked so hard in my life. It was me, basically one person looking after the whole [process].**” (C4:P1)

Therefore, between March and November 2014, the InterCity Group had to do most of its rebranding on buses and produce newly branded collateral and uniforms at each customer touchpoint. A standards and procedures booklet for drivers, which discussed InterCity's brand values and promises, was produced and distributed. Also, a rewards and recognition program, called the Extra Milers club, was established to remind and encourage employees to keep their company's brand values. While these new standards and brand promises were generally accepted, two items received pushback from drivers in particular: using the name ‘bus’ rather than ‘coach’ and not wearing ties. As part of instilling a customer-centric mindset, the marketing manager argued that drivers should call them buses rather than coaches because ‘bus’ is generally the term customers use. As intimated, this change of terminology was the marketing manager's idea, as opposed to an idea forwarded by personnel within the workshops. Although using the term ‘bus’ rather than ‘coach’ is stipulated in the standards and procedures manual,

many drivers resisted the change. As a long-term driver explains, the use of the term coach is used by drivers to differentiate the service they provide from other offerings:

“There's three ways of putting it. **You've got a steerer, and a driver and a professional...** Some [drivers] are professional because they do what we do and **go the extra mile with the passengers**. The majority won't even speak to their passengers, don't acknowledge them, and that's a driver.” (C4:P6)

Hence, according to a long-term bus driver, a professional driver drives a coach, and a bus driver drives a bus. Presumably, a ‘steerer’ is either a novice or a disrespected version of a bus or coach driver. Despite the marketing manager’s appeals, resistance by some of InterCity’s drivers to adopt the change in terminology was a matter of professional pride.

Additionally, wearing ties was also a point of contention, with some drivers believing that wearing a tie offered them a more authoritarian bearing. However, as the bulk of InterCity employees had chosen to embrace the modern ‘trusted uncle’ look and persona, drivers were asked not to wear ties again. Therefore, consistent with the democratic process that prevailed over the rebranding process, the rejection of ties was implemented more successfully than the bus versus coach argument. In sum, despite issues relating to uniform changes and consumer-centric terminology, and logistics around painting buses, most of the rebrand had been implemented by the summer of 2014.

Therefore, the marketing specialists’ knowledge shown in the implementation phase was his organisation familiarity, market intelligence, and leadership. For instance, when the creative agency collaborated with the marketing manager, they learned from his organisation familiarity how to develop the logo's design and use. Afterwards, the marketing manager surveyed its market to choose the logo's design and colour. Finally, the marketing manager also demonstrated leadership by insisting that the buses be repainted in the shortest time possible and then led the project management process to do so.

2.4.2.4 Appraising the marketing project

When appraising their rebranding project, the participants discussed several major features. First, unprompted feedback from InterCity’s customers regarding the rebranding’s look and feel was both overwhelmingly positive and, as the CEO explains, it reflected the persona that InterCity sought to embody:

“The feedback we were getting, **it's so on-brand. It was almost spooky in a way** because they were talking about the freshness of it, the New Zealandness of it. Which was one of **the attributes that we were aspiring to achieve** when we talked about what we wanted people to feel like about this. That sort of quintessential New Zealand feel about it. A great Kiwi family institution ... InterCity, that's in all your neighbourhoods and is part of your community and all the rest of it. **That's what we wanted to, you know, achieve.**” (C4:P2)

As shown, unprompted feedback validated the rebrand as customers recognised the New Zealand look and feel InterCity wanted to project. Additionally, to generate prompted feedback, the marketing manager created a 30-second video containing an InterCity bus being resprayed with the new livery. On the day of the launch of the rebrand, the marketing manager pushed the video onto social media. As the marketing manager explains, the response from the public was overwhelmingly positive:

“We pushed that [short video clip] out on social media on the day we announced the rebrand. It was just **this flood of comments** going ‘Love it’, ‘It’s great’, ‘Oh, that’s so New Zealand’, ‘So cool guys, it’s looks great, it’s looks modern’. **Not one negative. And social media, that’s really unusual.** It was just this **validation from people** saying, ‘It’s great. Oh, love it, cool.’” (C4:P1)

Moreover, since the launch of the rebrand, positive feedback from customers on social media has increased. Although comments like, ‘You’ve got your flash new buses, but you’ve still got a grumpy person who told me I couldn’t put my own bag on board’ were also posted. However, as the digital marketing and social specialist explains, overall, the increase of positive comments was very encouraging:

“I think I’m seeing a **higher proportion of positive feedback these days** and the thing about social media, in particular, **people are much more likely to post on a page with something negative rather than positive.** But if it’s something positive they might go yeah and tell their friends that they had a good bus driver, or whatever. But if something goes wrong that’s when they’re going to tell everyone that they can think of. And yeah, **I’m seeing a much higher proportion of positive feedback in terms of the rebrand** instead: ‘I enjoyed my trip’, ‘My driver was friendly’, ‘Did a good job’, I’m getting a lot more success stories coming in.” (C4:P4)

In addition to growing the characteristics they aspired to, the company’s confidence had increased, despite being in a market that was attracting more budget-service competitors. This confidence, as appraised by the marketing manager, was attributed to the rebranding process serving as a method of refocusing and re-energising the service ethic of InterCity’s personnel. Therefore, as the marketing manager explains, despite the incumbent nakedbus.com service and another low-cost competitor ManaBus entering the market, InterCity’s sales remained stable:

“We’ve got two budget operators operating in the market, operating on those runs. **Our market share across the country hasn’t changed. And our customers remain loyal to us.** And we’re offering a really good service and... no doubt it’s because we’ve gone through this [rebranding] process. Our staff are reinvigorated again because they’ve felt like there’s this platform, ‘I understand what I do now. I understand why I’m important. I understand why our product is better than the others. I feel confident and going out and doing my job every day.’... **I’m sure [our competitors] are frustrated because up until that point, yeah, we were this old fuddy-duddy looking brand.** I’ll be fairly confident we’re landing a few punches.” (C4:P1)

Further to establishing InterCity’s new persona, the marketing manager also felt the rebranding process had increased their personnel’s customer-centricity quotient. By having examined their firm’s brand and persona carefully and having taken the initiative to modernise and adapt them,

staff felt a new sense of pride in their work. As the marketing manager explains, the new sense of identity was reflected in how staff interacted with their customers:

“The way we engage with people has changed because we've now got a very different personality behind who we are. **We're proud of our personality now**, whereas in the past I think we were kind of, we were just new, we were just an old fuddy-duddy... We feel more confident. We feel more fresh and vibrant. **Because we internally feel more fresh and vibrant. And that's captured in our identity as well.**” (C4:P1)

As intimated, another aspect relating to InterCity's rebranding process was the opportunity it afforded to purge the company of its undesirable attributes. These attributes, particularly its 'fuddy-duddy' or an old-fashioned look and attitude, have now been replaced with a new, refreshed look and approach to service. This change in service delivery was also attested by a service supervisor who worked in Auckland's central depot:

“Once the rebranding came in, the new look along with the Wi-Fi, we have been getting a lot of positive feedback on these services. And they say, 'Oh, your buses are nice, even the drivers'. They get so much feedback about them, **positive feedback about the drivers and again it all comes back to the rebranding.** People think it's just awesome.” (C4:P8)

Finally, as intimated, the disconnect of franchisees to the InterCity branding had been largely purged, with relevant personnel readily adopting the new InterCity logo, uniform, and service standards.

Along with the reviews, market share stability, and the reinvigoration of service standards, the marketing manager was also positively appraised for his role in the rebranding process. From launching the rebrand, seeking and supporting his marketing consultants' ideas, and championing a modernising agenda, the senior managers praised his initiatives. Apart from the rebranding initiative, the CEO positively appraised the marketing manager's achievement in rolling out the brand treatments on buses plus the other marketing collateral with limited time. As the CEO explains, this logistical feat was achieved due to the marketing manager working closely with all the relevant operators:

“Having made a decision about what the brand treatment is going to be and the solution and all the reasons why. We had to then execute it across a whole range of platforms. No less of which you can imagine, you know, a large number moving metal objects called buses. But were in service, seven days a week as it were. **And... [our marketing manager] had to work really closely with all of our operators, to schedule in an efficient process** of changing out these... buses as quickly as we could. **But without disrupting what is a really complicated network with buses going all over the country on a daily basis.**” (C4:P2)

As discussed, despite the logistical challenges of repainting most of the buses before the summer peak, the marketing manager's project management skills were praised. However, while customer feedback, maintenance of market share, confidence in the brand, and of the livery's rollout was positive, not every facet fared so well. For example, as identified by a

customer service representative, adherence to the new standards and procedures was sometimes lax:

“There are some points of the rebranding [his example: Do it once, do it right] where **there can sometimes be a lack of relationship between the brand value and the delivery of that promise.**” (C4:P9)

The specific instance the call centre representative alludes to was a recent change and re-changing of certain timetables, bus stops and routes, which was not done once nor right.

On the other hand, identifying shortcomings to the service promises was possible in part by the clear recall and understanding of their brand promises. Therefore, by having clear and agreed upon service standards, personnel were more able to appraise their standard of delivery and that of others, leading to an increase in accountability. Remembering the project was still in its infancy, the digital marketing and social specialist appraised InterCity Group’s progress in the following way:

“The rebrand has made a good start on ushering in change throughout the company **but there's still a long way to go...** The look of the buses and the entire brand is positive. And we're beginning to see people, you know, adopting the values and recognising that it can make things better for themselves and customers. **But there's still a lot of organisational change that needs to keep happening.**” (C4:P4)

In sum, regarding the knowledge the marketing manager used to plan, develop, implement, and appraise InterCity's rebrand, his underlying proficiency was his project and change management skills. Throughout almost all the project, the marketing manager played the role of facilitator by engaging marketing experts to drive both the research, rebranding and creative procedures.

Moreover, rather than make directive decisions, the marketing manager typically used surveys, rather than personal appraisals, to determine outcomes such as the livery design. In other words, rather than being the strategic or creative force within the rebranding process, the marketing manager contracted and facilitated accomplished experts to perform these roles. Also, during the respraying of buses and the development of the rebranding's artefacts, the marketing manager played a central, overseeing role by networking with operators, stakeholders and contractors. This championing, corroborative, and overseeing role allowed the marketing manager to engage experts and make decisions based on both InterCity's personnel's and its market's preferences. In doing so, the marketing manager was able to create leverage using the market's and personnel's voice, and the advice of experts to drive the rebranding process forward. This leverage was essential in overcoming the traditional ‘fuddy-duddy’ approach which permeated various quarters of InterCity's franchisees. In sum, the marketing manager's change and project management capabilities proved essential in completing a significant rebranding project which was prone to stalling due to the variety of stakeholders involved.

As seen, during the appraisal stage the marketing manager demonstrated market intelligence, leadership, and organisation familiarity. By collecting feedback from customers regarding the look, feel, and service standards of InterCity after the launch, the marketing manager was able to gauge the market's response. Next, the appraisal phase helped validate the leadership of the marketing manager in several ways. Here, the unity of the board and stakeholders, the adoption of the increased service standards and the new logo can be attributed to the leadership of the marketing manager. Finally, the organisation familiarity was also evident during this phase as the marketing manager kept abreast of uptake as stakeholders in the InterCity Group were adjusting to the rebrand.

2.4.2.5 Marketing specialists' knowledge within projects

Overall, from InterCity's planning to implementing phases, the marketing specialists demonstrated various aspects of the five knowledge domains identified in the literature review. During the planning phase, the marketing specialists collectively showed marketing expertise, market intelligence, organisation familiarity, and leadership. Within the development phase, they mainly demonstrated marketing expertise, organisation familiarity, leadership, and life experiences. Next, during the project's implementation, the marketing manager demonstrated organisation familiarity, market intelligence, and leadership. Whereas during the appraisal phase, the marketing managers employed market intelligence, leadership, and organisation familiarity. As shown, each knowledge domain played an important role as the marketing specialists planned, developed, implemented and appraised InterCity's rebranding project.

2.4.3 RQ2: The influence of marketing specialists' knowledge

The influence of InterCity Group's marketing specialists, specifically the marketing manager and the strategic marketing consultant, has been analysed at three levels: the marketing specialist, firm, and market levels. The marketing specialist level discusses the marketing specialists' influence among themselves and the rebranding project. The firm level describes the marketing specialists' influence within InterCity, namely the board, senior managers, franchisees and personnel. Whereas the market level considers the marketing specialists' influence on the marketplace, specifically their target market, its two major competitors, and other stakeholders in its industry. Therefore, the following section describes and analyses the influence InterCity's marketing specialists had during its rebranding project in the following areas: the marketing specialists, the InterCity Group, and their influence on their target market, competitors, and industry stakeholders.

2.4.3.1 Influence at the marketing specialist level

From the data collected, the marketing specialists demonstrated their influence over each other and the subsequent project in several ways. First, the marketing manager positioned himself between external marketing parties and the InterCity Group in order to mediate the rebrand's

progress. Being familiar with the way things were done within InterCity, the marketing manager was able to guide third-party marketing-related consultants towards brand-appropriate outcomes. In contrast, without the marketing manager mediating almost every aspect of the rebrand, inefficiencies between third-party consultants and the various departments within InterCity would reportedly have arisen. In the first example, the CEO describes how ineffective the *planning and development* of the rebranding project might have been without their marketing manager:

“If there was no [marketing manager], or no role like that, then the risk I would see, is that you've got an agency that's potentially developing, with all good intent, you know, a look and feel and a flavour of a brand; **but maybe [not] the connection that you need** to have back through to your teams and people that are actually going to deliver it. The reasons why you come into that view on your brand wouldn't be as naturally as easy to achieve. **Because you've got an agency sitting out to the side and not dialled into the organisation on a daily basis.**” (C4:P2)

In the second example, one of the general managers described how inefficient the *implementation* of the rebranding project might have been without the marketing manager:

“When you're looking at how a brand should resolve itself on a coach or how to resolve itself on a website. **None of us except for [our marketing manager] have got any idea on how the mechanics that go into making that happen.** And if you had to outsource that to a consulting agency, that consultant agency would have to go and talk to our web developer person and they would have to go and talk to coach operations people. And you probably would've needed one of us [senior managers] to play piggy in the middle, relaying messages on. I think it just would have been quite disjointed. And [our marketing manager] who is a part of the senior management team, he is the decision maker, he is empowered to make decisions and he knows his stuff. **He made that much more of a seamless process.**” (C4:P3)

As shown, the central positioning the marketing manager undertook increased the effectiveness and efficiencies of the rebranding process, according to his senior manager. As well as influencing the project's progress as an arbitrator, the marketing manager also played the role of overseer, which meant he was indirectly influencing other marketing specialists. In this role, as the marketing manager explains, the expert marketing specialists he contracted had more expertise in rebranding projects than he:

“**Going through the process with [the marketing consultant] as the support for [the workshop tour], then handing it off to the creative** who is going to be the interpreter, **I felt very comfortable in doing that.**” (C4:P1)

To expand more on his position as overseer of experts during the marketing project, the marketing manager provided a further explanation:

“You know if you think in terms of an organisation in terms of how a CEO who sits there and just **sits at a higher level, just kind of moving things around.** In terms of running this brand project, it's kind of what it felt like. You have an agency that is giving you advice and doing some of the groundwork for you. Yeah, I'm participating in bits and pieces and I'm also listening to what everyone else is saying. And at the end of

the day **I'm also giving either indirect or direct feedback and moulding the process with the agency** that we're working with. We all have ownership over it, but I wouldn't of, for a second think that I've been the creative force behind what we came up with. It was the stewardship of it I guess, really cause you, you are the one that sits there, and you know, I'm the one that went out and found the guys and chose the partners we wanted to work with." (C4:P1)

As his area of expertise was online marketing, the marketing manager's main role was the overseer, while others developed the brand strategy and creative design. In other words, the marketing manager lacked the skillset and experience to strategise and execute a rebranding exercise or design livery competently. Therefore, being aware of his limitations as a marketing specialist provided a vital, albeit inconspicuous influence on the success of InterCity's rebranding project.

Concerning the marketing consultant's influence, specifically during the workshops around the county, several factors emerged. During his pitch, the marketing consultant persuaded the marketing manager that both his credentials and a collaborative strategy were an appropriate match for InterCity's rebranding project. The marketing consultant describes part of his initial pitch to the marketing manager the following way:

"I said to [the marketing manager] that **typically there would be an Explore workshop with a bunch of people from the company** who do the hypothesis and come back and have a return session. And we agree on a definition and what we're going to do from there with regards to embedding it and rolling it out. However, because of what they explained to me, that it was the different franchises and the hundreds of drivers around the country and challenges and issues they were facing, I said, you know **I think this could be a case for doing some proper stakeholder workshops around the country**. And I referenced other projects." (C4:P5)

In referencing other projects, the marketing consultant provided details on previous projects whose circumstances were similar, or direr, than InterCity's. Having won the contract, the marketing consultant explains why a third-party consultancy has a greater chance of success in running rebranding workshops than a company doing it themselves:

"You need an external. People often try and do these projects internally and they typically wither on the vine. And I've been bought into projects over the years, where they go, 'We spent last year trying to do this'. You need an external party. **You need someone that will come it because it makes people behave differently.** It puts people in a different mindset." (C4:P5)

The different mindset that the marketing consultant refers to is partially due to his lack of political alliance and familiarity with personnel within the company. Moreover, the marketing consultant was experienced in facilitating these workshops effectively. Therefore, the decision to hire a branding consultant proved a significant influence on the marketing manager and InterCity's rebranding project.

The final marketing specialist to have a major influence on the InterCity's rebrand was the creative consultant. Their role is described here as an interpreter of the workshops' results,

which led to the design of the livery. This interpreter/designer role played a significant part in the rebrand due to the positive influence the livery design had on InterCity completing its project. As the interpreter of the regional workshops, the creative consultant's role was to create a design that represented the major findings and the expressed values. The marketing manager explains how the creative consultant finally presented a suite of five design options for InterCity to choose from:

"And look, [the creative consultant] came back with quite a suite of stuff, that's great, and that's what we wanted. **Some were very left field**, and some were pushing the boundaries. And that was good because it gave us some: if you really want to go really modern and you want to go right out here, this is where we can go... We had about five [different designs]. And you know, **what we've got now, is by the far the clear winner for everyone**. You looked and you went, 'Oh yeah, that feels right.'" (C4:P1)

As shown, the creative consultant interpretation and design resonated with senior management and was accepted immediately, although as described earlier, the colour of the design was at this point undecided. As discussed, the colour green was selected after a survey of customers was taken. The marketing manager goes on to explain why the creative consultant's interpretation and design won them over:

"We loved the aspect of the little icons that portray New Zealand. The idea behind that was that you're standing there, about to get on your bus, and there's the North Island livery and a South Island livery. The North Island one has more North Island ports of interest, and the South Island one has more South Island ones. So, when you're standing next to that vehicle, waiting to put your bag in you will see a Kiwi, you will see the lighthouse from Cape Reinga, you will see, there are so many. You will see a wizard in a Hobbit hole, you will see the Beehive, the Sky Tower. We have got a whole suite of them. **And we love the fact that it gave us a language to be able to use in everything we do across the business. It tied it all together.** We're this New Zealand company." (C4:P1)

In sum, the marketing specialists' influence was connected to both their area of expertise and the specific area of the project over which they were responsible. The marketing manager, who lacked the marketing strategy, branding, and design expertise, sourced that knowledge from subject-specific marketing experts. By assuming both a central and overseeing role, the marketing manager corroborated with marketing specialists to complement each the project's settings in light of InterCity's branding and business objectives. In these ways, the marketing specialists played a significant role in influencing one another and InterCity Group's rebranding project.

2.4.3.2 Influence at the firm level

The study also investigated how marketing specialists were influential at the firm level. The firm level refers to various non-marketing personnel throughout the InterCity Group, including board members, senior management, franchisees, and frontline staff. As one of the general

managers explains, due to InterCity's franchise structure and numerous change resistant personnel, the marketing specialists would have some challenges trying to transform them:

“The way that we operate is through a franchise structure, so we don't employ our own drivers and we don't own our own coaches. And I knew that right from the outset that anything we did to try and change the way that we engage with customers, or redefined our service expectations, was going to be a huge task that would involve a series of dotted lines where we can't just issue an order, **but we have to rely on influence...** it was all about **making sure that we got buy-in** from the, not only the heads of those franchise operators but also the operations departments, the maintenance departments and the drivers all the way through.” (C4:P3)

As mentioned, InterCity's multiple franchise structure, which included two major New Zealand transportation companies, Ritchies Transport and Tranzit Group, would need to commit to InterCity Group's rebrand. Although the heads of these transport companies, one of which had recently completed a rebrand of their own, sat on InterCity's board, there was no guarantee that they would agree to the rebranding project. Moreover, the rebranding project was not planned to be an updated logo and livery project but included a series of workshops personnel from each franchise would be required to attend. Furthermore, the heads of each franchise knew that their employees would be required to comply with InterCity's revamped service standards and procedures. As one of the general managers asserts, these changes could not be achieved by issuing an order, but by relying on influence; he went on to say:

“You can paint a coach, but it just takes time and money right. But to change service standards [you] actually need to change people's beliefs.” (C4:P3)

By the end of the project, the marketing specialists were largely successful in implementing the project. Evidence from the data collected suggests they were able to influence stakeholders across InterCity Group due to the following reasons: leverage from market research, expert opinion, stakeholder workshops, as well as attitudinal, authoritative, and situational influences. The purpose of their influence was to change certain behaviours; therefore, the following section discusses further each lever the marketing specialists used to influence InterCity and the resulting behavioural changes.

First, market research influenced the firm by convincing the board and senior management that a rebrand was needed, and in helping InterCity resolve their livery design and service standards. Their market research proved influential due to the deference senior managers gave the market's voice, suggesting a pre-existing consumer-centric ethos within the governance and senior management. Therefore, as the marketing manager points out, a major fulcrum of influence was the market research he had commissioned:

“Going back to the research that gave us the opportunity to go back and really you know, it gave me the ammunition to go back to our board and our shareholders... It was the research they couldn't argue with.” (C4:P1)

As the results of the survey were analysed, the InterCity Group management conceded the disconnect of its livery and logo device, as well as certain aspects of its service delivery. For example, despite being loyal to InterCity, the research results showed that customers thought the look of the bus and its drivers were tired and old-fashioned. However, as aspects of the rebranding process were being implemented, objections would arise from board members and stakeholders about some of the changes being introduced. For instance, one board member and some bus drivers resisted the more modern uniform concept of not wearing ties. As one of the general managers explains, the voice of the customer, i.e., market research, was used to convince stakeholders of why the uniform change was necessary:

“We kept returning time and time again to what our customers had told us. Because what we were dealing with in terms of the objections where the perceptions that the drivers had that they needed to have a tie, to have command and have authority. And we had objections from board members who said that ties look smarter, ties look more professional. So that's the perception and people who are free to hold their own opinions; but how our tactic was to go again and again to say, ‘This is what our customers are telling us. They're telling us that they want to have drivers who are professional but are also friendly and approachable. And this uniform specification that we are putting in front, achieves those goals’. And look, **eventually it worked but it was a process of convincing drivers and convincing board members using the customer as our voice.**” (C4:P3)

Hence, the appeal of the market's voice eventually acquiesced stakeholder objections to the change in uniform standards. Therefore, the candid judgements provided by InterCity's customers provided sufficient force to instigate the rebranding project and overrule the personal views of senior stakeholders. In a similar vein, another lever the marketing specialist used to influence the board and senior management was an expert opinion, particularly the marketing consultant's viewpoints. Apart from the experience and success with previous rebranding projects, the marketing manager suggests the marketing consultant's opinion was influential due to the perception it was objective, external, and nonpartisan:

“And almost to give us a little sense of trust, almost that there was someone impartial working on and in conjunction with us who had done these before. There was that sense almost, it was easy to walk back into a pitch to a board and say here's what my recommendation is. **And there's validation** because, well we've worked with other people on this and we all agree, that this is where think we need to be. **It's not just management's opinion or based on our own internal thinking.**” (C4:P1)

As discussed, the marketing consultant's expert opinion was influential when presented to the board because the experience and success he had trumped the board members', despite their experience and perspectives. Additionally, the marketing manager agreed with the marketing consultant's appraisals and recommendations which added further weight. While experience and success have leverage, the chairperson explains that the marketing consultant's proposal to run workshops throughout the country also demonstrated shrewdness:

“Because we work at InterCity, and that’s our brand, we had to get buy-in. Now I **thought that was a clever move really; if everybody has a say in it.**” (C4:P7)

Regarding the behavioural changes the marketing specialists caused, the board readily agreed to their recommendations to run workshops at depots throughout the country and embraced the rebranding process. One of the general managers discusses the implications of having InterCity Groups board’s support:

“The great news is that we have a board of directors that really had signed on and supported us in this exercise all the way through. And **those directors on the board also happen to be our, heads of our coach franchisees.** So, we sort of have that implicit buy-in, they supported us at a board level so when you put franchisee hat on and now you're thinking about yourself as a coach operator for InterCity. Of course, you're going to support that as well. **So, we had that buy-in right from the top and now the work is around how we actually execute that right the way through** to all the main players of maintenance staff, operations staff, and drivers. Plus... with our own business as well.” (C4:P3)

Unilateral approval from the board was critical for several reasons. First, as the board controlled the purse strings and governance of InterCity, their commitment was essential. Also, as some board members were also owners of franchises, their commitment advanced the commitment of their company's employees. Moreover, as owners of franchises, the board members' approval, authorisation and enthusiasm provided the marketing specialists further leverage while working on the rebranding project. The marketing consultant put it this way:

“What made it easy was the **very good understanding and positive buy-in and support** for the project. That makes my life hugely easier.” (C4:P5)

As discussed, with the board and senior manager's approval, the marketing specialists began conducting workshops around the InterCity Group depots throughout New Zealand. These workshops provided feedback from personnel which went on to influence InterCity's service standards and procedures manual. Therefore, as opposed to the InterCity management imposing new standards upon the various franchises around the country, the marketing specialists were confident that personnel would propose their service standards. The marketing consultant explains:

"[The InterCity Group] had an absolute prime and ripe workforce to work with because people love being put in the situation where they have got a chance to talk about the business they work in. And **they get listened to and their input is going to be valued.** It doesn't happen very often. Hardly ever.” (C4:P5)

In this approach, the marketing consultant pressed participants to express the service values they should aim for. As a result, catchphrases such as, ‘Go the extra mile with a smile’ and ‘Do it once, do it right’ were offered by personnel and then appropriated by the marketing manager as service benchmarks. Therefore, the marketing specialists' workshop approach provoked employees to propose relevant as well as high service values. Furthermore, unless personnel

from the workshops had developed the new service standards, managers at InterCity Group would have found it difficult to both create and impose them. Apart from garnering the voluntary high standards of service among personnel, this consolidative approach also furthered their allegiance toward the InterCity Group. In other words, personnel appreciated having a chance to provide input into how the service could be improved, which helped grow their allegiance to InterCity. For example, the marketing manager explains how a particular question during the workshops highlighted where their allegiance lay:

“One of the questions we used to ask is, ‘Who do you work for?’ ...Some drivers were ‘I work for Ritchies, but I drive InterCity’, and some guys, who turned out to be the majority, would say, ‘I drive InterCity, I want to feel like I work for InterCity’... [or] ‘I don't feel like I work for InterCity, at the moment, I feel like I work for Transit.’”
(C4:P1)

This behavioural change was only one of the influences of the shareholder workshops captured in the data. Hence, behavioural changes were caused by self-imposed and agreed upon idealised catchphrases. For example, the easy-to-remember ‘Go the extra mile with a smile’ provided a benchmark for personnel across InterCity Group to either oblige or inspire and self-evaluate a customer-facing service standard. A call centre representative puts it this way:

“When you give a definition to the kind of customer service that you're giving, it really does, it gives a whole new meaning to it in itself, your delivery of your customer service. Because the whole time we thought that we were just being excellent CSR's, whereas [now] we knew we were ‘going the extra mile with a smile’. Or we were ‘ahead of the rest’ by providing such a service. We defined the behaviour and we defined the kind of customer service that we gave. So, in respect to the contact centre, the rebranding was an awesome thing. **It gave definition to the kind of role that we had.** Because before that we answered phones, took credit card payments and said thank you, bye.” (C4:P9)

As shown, the service standard catch-phrases helped define and therefore influence how a front-line staff member did their work. The data suggests that this influence was achieved by introducing and developing the rebranding project with personnel, i.e., running regional workshops and producing ideal service standards. Participants suggested that this process plus the tangible changes in the logo and uniform provided staff, particularly legacy staff, an opportunity to change their old behaviours. A new bus driver to InterCity had the following view:

“From my perspective, the rebrand has made possible to let go of old attitudes in the company and open the way to the future... Yeah in particular when you go into an old coach with an old logo on it, and a dusty old office; you kind of carry on with the attitudes that come along with it. I think in particular the old drivers, you know, are set in their ways, particularly the ones that have been in the business for twenty years. By wearing a new jacket and having a bus that is painted in a different colour. I think **it actually reinforces and reminds you that things are different.**” (C4:P10)

Therefore, both the tangible rebranding collateral, i.e., the new service standards, logo, livery, and uniforms plus being included in the rebranding process positively influenced InterCity's personnel.

As discussed, the marketing specialists influenced InterCity Group's board and personnel through conducting market research, providing expert opinion, and holding stakeholder workshops. The marketing specialists, particularly the marketing manager, was also influential across InterCity due to both his attitudinal and authoritative influence. Attitudinal influence is discussed here as the difference the marketing manager made throughout InterCity by their championing manner and positive demeanour. According to the CEO, the marketing manager's attitude was a major influence in creating buy-in, generating the funding, and continuing the momentum behind the project:

“[Our marketing manager] was, **he was a champion of this process**. In doing that, a part of his job was to actually **make sure people that needed to be excited about this were excited** about it. And that included the people that were ultimately going to sign the cheque. It wasn't just, you know, a sales job, **that was him genuinely believing that this a catalyst for a whole bunch of positive change**. And that was what created the momentum behind this. **Once we got a certain amount of momentum, it was actually pretty easy to keep that going** and then it became a question of just getting in to the details.” (C4:P2)

Additionally, one of the general managers describes further how the marketing manager's attitudinal approach engendered or transmitted excitement and enthusiasm about the project. As this general manager explains, the marketing managers energetic approach and persistence kept the project top-of-mind among the board and senior managers of InterCity:

“[Our marketing manager's] the **naturally vibrant, enthusiastic guy, full of energy. And that's the approach**. He's excited about it, he's enthusiastic, he's jumping with energy and **that I guess is infectious to an extent**. We have monthly management meetings and that was always an agenda item if it wasn't on your agenda already, he would place it there. We were always discussing it, it didn't sort of go dormant at any stage. So, he was just active on it. He was constantly talking about it. He was constantly energising himself and energising the rest of us about it. So, creating that enthusiasm so that we kept in that, **stayed in that headspace and we collectively stayed excited about it as well as he did**.” (C4:P3)

As well as his attitudinal influence, the marketing manager also adopted an authoritative influence when necessary. While typically engaging a democratic style, i.e., complying to the perspectives of experts or the majority of personnel, the marketing manager was also appointed to shoulder a directive role. For example, the chair of the InterCity Group's board discussed how, as the appointed leader, the marketing manager directed the board toward deciding a disagreement regarding a service standard:

“**At least one of the franchisees was adamant that they had to wear ties**, and some of the drivers wanted to wear ties... [the marketing manager] took us through and said, ‘Look, here's what the guys said the company represents, it's comfy and it's all of those

things. It's cautious and so on. But we're not prissy, we're not old fashioned, **so how can we possibly wear ties against that backdrop, that cultural brief? It was compelling, and we said, 'Ok, you're in charge.'**" (C4:P7)

As shown, although required to have an authoritative influence, even toward board members, the marketing manager leveraged the voice of the market rather than proffer his own opinion. In another example, the marketing manager also, albeit indirectly, used authoritative influence over the personnel of InterCity by having the owners of major franchises endorse the rebranding project. Specifically, toward the end of the rebranding project, the marketing manager issued a DVD to each staff member which visually journaled the rebranding process. As described by the marketing manager, the video presentation included two major franchise directors who commended the rebranding project:

"[There] are the two shareholder directors of the two large or the two main franchises that we have in the country. **It was important to get them on this DVD to say, 'We buy into this, and we agree with it.'**" (C4:P1)

Finally, another form of influence that undergirded the progress of the rebranding project and the marketing specialists influence was the situational influence. The situational influence, or the environmental catalysts stimulating the rebranding project, were made up of the increasing competitiveness of other transport companies, and the oldness of InterCity's livery. These environmental catalysts, provided a 'burning platform' as described by one of the general managers, abetting a sense of urgency for positive change:

"It's describing that we have a burning platform. You know we have a brand which has got a lot of loyalty about it, but we have a wide range of service standards which apply across the country. **And we have some pretty hungry competition that is eroding our growth.** And if we're serious about growing this InterCity business we need to have a common set of standards, a common set of beliefs and values. And we need to have a contemporary and relevant visual image as well, and this is all because we want to grow the business. **And so, that concept of the burning platform this is a priority for change. This needs to happen.** That was really important. And as I said it was a nebulous thing because if you say how many extra sales are we going to get from painting our buses green instead of blue, pretty difficult. But guiding through the customer research, the staff feedback and getting that rolling tsunami of feedback that created that sense of management and amongst the board, we had something really critical to work on. I think that was a real vital part of the equation." (C4:P3)

Therefore, as summarised by one of the general managers, the situational influence, particularly InterCity's increase in competition and desire for growth, reinforced the various influences the marketing specialists required. In other words, the plight that InterCity Group found itself in, despite the strong loyalty expressed by customers, was allowing the marketing specialists a significant latitude and budget to introduce changes.

In sum, the data strongly suggests the marketing specialists were able to influence stakeholders across InterCity Group for several reasons. First, the marketing manager leveraged the senior management and the board into considering an extensive rebrand by producing findings of

market research convincing the InterCity Group to modernise. Next, the marketing manager influenced senior staff and the board with the expert opinion of the marketing consultant, with the approach to developing the rebrand with stakeholder workshops. Further leverage used to develop the cultural benchmarks, logo designs, and culture of InterCity was garnered at the stakeholder workshops. Moreover, as the evidence indicates, the marketing manager was influential over colleagues and senior staff due to his positive attitude, and at times, imposing stance. Finally, the situational influences, namely the competitive environment InterCity operated in, particularly the budget-priced competitors, was also used as leverage to motivate InterCity Group rebranding processes.

2.4.3.3 Influence at the market level

In addition to the marketing specialist and firm level, the evidence collected describes the marketing specialists' influence at the market level. The market level describes the InterCity Group's competitors, target market, both domestic and trade, and the regional tourism authorities. At the market level, evidence suggests the major influence the marketing specialists demonstrated over their competitors was minimising their offerings' impact InterCity's market share. Although there is a lack of quantitative evidence, the marketing specialist and other senior InterCity participants strongly believe that their rebranding project reinforced their premium position in the transport market. This reinforcement, anecdotally speaking, rebuffed further market erosion from the incumbent low-price offering of nakedbus.com and more importantly, a new entrant ManaBus. As the marketing manager explains, ManaBus was a surprise low-priced entrant to the market whose credentials were potentially more disruptive than nakedbus.com's:

“What has it done for my competitors? So, in terms of, that's a difficult one to quantify because I don't know. What I can say is though is we have had a third competitor come into the market in terms of ManaBus, who we didn't know were coming in. We found out at the tail end of that rebrand project. And given that the owner of that business is a billionaire and you know, runs budget bus companies around the world, that was big competition. We knew, you know, that **this guy was going to come in and was prepared to lose money for a very long time to get established**. Very different to the other competitor [nakedbus.com] that we had. And they're much slicker in terms of their offering as well.” (C4:P1)

However, despite being surprised by the entrance of a well-financed, multi-national competitor, the marketing manager and the other participants remained confident in InterCity retaining its market share. This confidence was due to the thorough process they had undertaken on both the livery and the customer service standards throughout their franchises. As the marketing manager explains, while the new entrant has failed to erode InterCity's market share, based on press reports he believes ManaBus entrance has increased New Zealand's passenger numbers:

“**If we hadn't of done anything, talk about disruption**. It would've been disruption and you would have been going... ‘Guys we need to be doing something about this.

You know, we've been telling you for years'. Anyway, so what I was going to say though in terms of validation for that, we talked before about our market share having not changed with a new competitor coming in the market [along with] nakedbus.com. **Our market share hasn't changed with a third competitor coming into the market.** Now, you know, I'm reasonably confident that the market has grown organically because of that new competitor coming into the market. There's a lot of press around them coming in." (C4:P1)

Therefore, from the marketing manager's perspective, ManaBus' low-cost offering has grown the market rather than encroached upon InterCity's market share. As implied by the marketing manager's imaginary scenario, 'Guys we need to be doing something about this...', the rebranding's timing was fortuitous. In other words, combined with their old branding and nakedbus.com's impact on the market, a new competitor could have had deleterious effects on InterCity's business and future development. As intimated, a rebranding project post-ManaBus would have been a reactive rather than a pro-active exercise, straining InterCity's franchise relationships and the rebranding process. However, as one of InterCity's service supervisors commented:

"I think it happened in the nick of time in the end because of ManaBus launching." (C4:P4)

Turning to the marketing specialists influence on the domestic customers, the participants shared a variety of personal stories of their experiences with how customers responded to the rebrand. As discussed above, overall customers have responded very positively as shown by social media posts, face-to-face conversations with InterCity personnel, unprompted responses, and an in-house appraisal of InterCity's market share. A comment from a service supervisor from a city centre's depot suggests that the new livery is attracting a younger market:

"I think the rebranding is really good. When I was at Sky City, with the whole new paint job and the whole redo of the office, and along with the ... buses we got more people coming in and saying, 'What company is this?', 'Have you changed?' **We ended up getting a younger kind of demographic coming in.** So, students, a lot of the Uni students who would track back and forth from Hamilton to Auckland, even Palmerston North and we got them more frequently as well, 'Oh, I think this is really neat how you've changed your services.'" (C4:P8)

As well as its influence on domestic customers, participants suggest that the rebrand has also positively affected InterCity's Group's trade customers. Their trade customers consist of stakeholders, travel agents for example, who although they may not use InterCity's services themselves, may recommend them to their customers. As explained by the marketing manager, based on the new look and feel of the rebrand, these stakeholders may influence their customers towards using InterCity's services:

"We've had to go out to trade customers as well and say we have rebranded and this is who we are. People who actually don't deal with the InterCity product directly as consumers, there's been a really strong endorsement with that as well, people going, 'Great, love it.' And **these are people that sell New Zealand.** So, when we show them

what we've done and who we are, **there's huge endorsement with that** with, 'it's great!'" (C4:P1)

Along with the trade customers, the marketing manager also engaged with some regional tourism organisations (RTO) in order to acquaint them with the rebranding. Therefore, while visiting them, the marketing manager asked the managers of the RTOs to name local places or icons that best represented their region. Afterwards, the marketing manager gave the RTO's recommendations to the design agency who converted them into the small icons of New Zealand that makes up InterCity's new livery. Similar to the democratic approach used in the workshops, the marketing manager sought a commitment from the RTOs, asking them to bestow a mutually-beneficial, conscience contribution to the rebrand. As the marketing manager explains, apart from strengthening their ties with RTOs, the other benefit was having logos in their new livery that were relevant, quirky, and recognisable:

"I went up to the Regional Tourism guys and said..., 'What are the 3 icons that you think really say [Christchurch]? Tell me what they are. Do you want to use them? Oh, that's great. Thanks guys'. Then when we go get them illustrated...You've got one there for Taranaki. But that's we wanted though. We wanted some [logos] that you will get and some that you wouldn't, but you would if you were from that region and you'd go, 'Oh yeah, I know what that is.'" (C4:P1)

Although the project was deemed a marketing success, the marketing specialists' market influence was measured by anecdotal evidence regarding their competition, their domestic and trade customers, and the RTOs. Overall, the marketing specialists' influence served to shore up InterCity's market share, as well as impress and engage their customers and industry stakeholders. Some evidence also suggests that the rebranding project had attracted a younger demographic than the previous branding. This influence may be attributed to the marketing manager's original intention of modernising the brand and the service standards. To achieve this aim, the marketing manager asked people from their target market about their preference for the look and feel of InterCity Group's livery. In other words, consistent with the marketing manager's *modus operandi* throughout the marketing specialist and firm levels, the livery was a reflection of the market's voice.

2.4.3.4 InterCity Group's marketing specialists' influence

Overall, the influence of the marketing specialists at the marketing specialist, firm, and market levels might be largely attributed to the appropriate application of a democratic process. The InterCity Group is a conglomeration of several companies with franchise agreements which aims to attract customers nationwide. The marketing specialists realised early in the project that imposing a rebrand upon in an autocratic manner was unlikely to garner a commitment to the project from stakeholders. Furthermore, the expected negative reaction to an autocratic approach would likely trickle-down and effect service standards nation-wide. Instead, the marketing specialists collected and refined the feedback, ideas, and the views of stakeholders to

give their voice to the rebranding process. This process also included the target audience who were asked to choose their preferred livery design and colour. As the findings suggest, consolidating and seasoning the stakeholder's and market's voice with the marketing specialists' areas of knowledge proved to be influential at all levels of the project.

2.4.4 Summary of the InterCity Group case

The marketing specialists' knowledge demonstrated in the InterCity Group's rebranding project was influential at the marketing specialist, firm, and market levels for several reasons. The marketing manager had been with the InterCity Group for ten years and was influential among personnel and senior management due particularly to his online marketing and sales expertise. Recognising the need for a rebrand, the marketing manager leveraged findings from a survey to convince the board that an extensive rebranding project would need to be undertaken. Inexperienced in rebranding, the market manager sought the services of a marketing consultant who in turn recommended collecting data from the various stakeholders to design the rebrand's architecture. The marketing manager also adopted this posture when he surveyed InterCity Group' target market to select the livery and colours. Therefore, the marketing manager was influential by adopting a collaborative approach to centralise and distil information relevant to each level of the rebrand thereby creating consensus from those involved.

Appendix 3 Case artefacts

3.1 Tourism Bay of Plenty

3.2 Zespri

3.3 Trustpower

3.4 InterCity Group

3.1 Tourism Bay of Plenty

Promotional examples using the juxtaposition of laidback/sophistication motif:



Tourism Bay of Plenty for Everyone television commercial example:

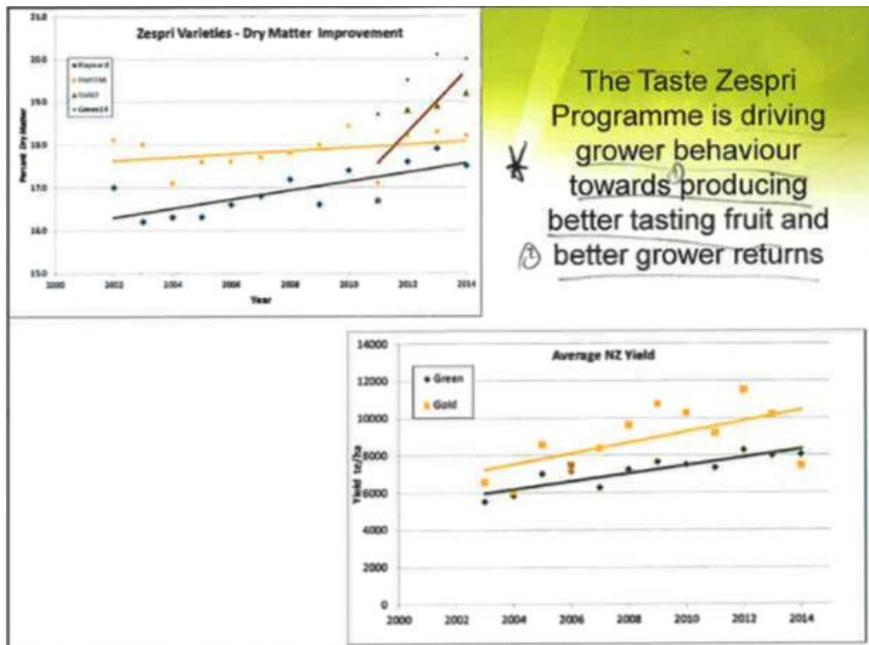
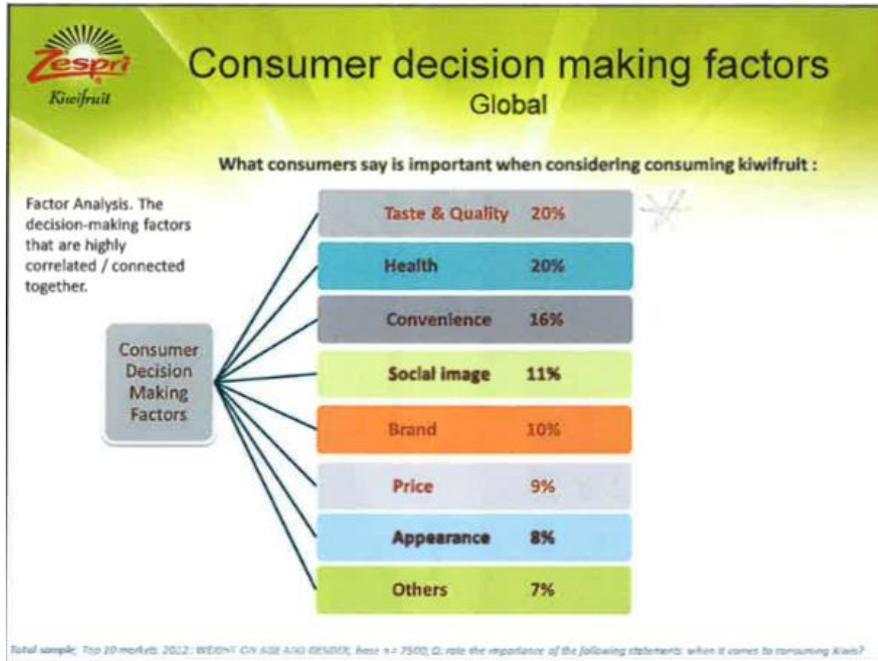
- <https://www.youtube.com/watch?v=y360xU8SuBI>

Tourism Bay of Plenty 'Plenty to Love' promotion extension example:



3.2 Zespri

Key slides from the trade presentation discussing the need to improve the taste, and therefore change the growing behaviours of kiwifruit orchardists:



3.3 Trustpower

Trustpower's old logo (left) and rebranded logo (right):



Trustpower's television rebranding commercial:

- <https://www.youtube.com/watch?v=omCkm3FXcYE>

Trustpower's television 'Comic-con' commercial example:

- <https://www.youtube.com/watch?v=gPSybOb41gE>

Trustpower's \$49 web banner promotion example:

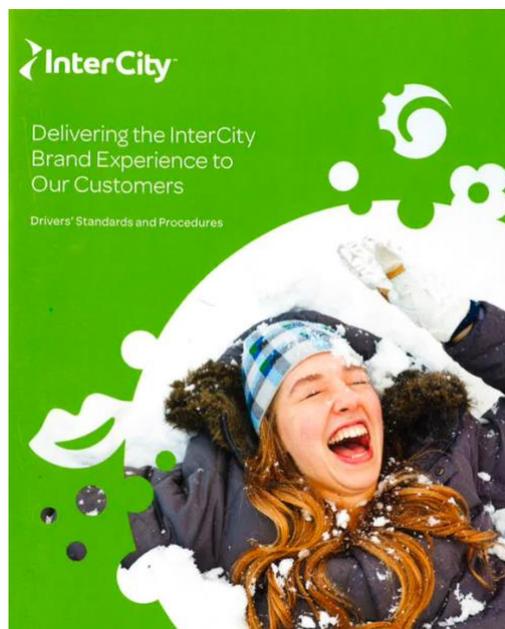


3.4 InterCity Group

InterCity Group's old logo (left) and rebranded logo (right):



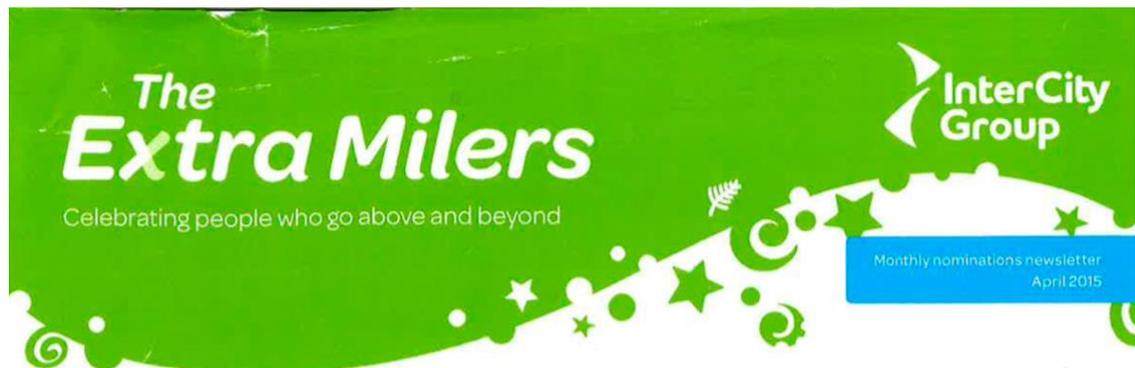
Cover of InterCity Drivers' standards and procedures booklet:



Example of an InterCity group poster with bus livery:



Front page of the InterCity Group's Extra Miler's newsletter:



Go the Extra Mile (with a smile)

▶ Customer First (Manaakitanga) ▶ Ahead of the Rest ▶ Do it Once, Do it Right

March Winner



Tom Stott
Bay of Islands

Role: Vehicle Ferry Skipper
Value: Ahead of the Rest, Do it Once, Do it Right

Earlier this month our vehicle ferry Arawhiti went to Whangarei for her out of water survey. She was sent early to avoid the swells generated by Cyclone Pam.

Tom was asked to check the vessel on the Monday night and Tuesday morning as Pam passed through. He went a step further and camped out on board the ferry overnight to ensure its safety.

During the night when the storm was at its peak, Tom started the vessel and held her off the wharf to reduce the impact of the vessel against the wharf.

Thanks Tom for going the extra mile!

Nominated by Charles Parker

Extra Miler News

The Extra Milers newsletter is our way of recognising InterCity Group staff and drivers who are demonstrating our brand values and promise.

A big thank you to everybody who has sent in nominations so far.

Nominate an Extra Miler

Tell us about someone who's going the extra mile with a smile!

Any InterCity Group employee or driver can send in a nomination to extramilers@intercitygroup.co.nz. Tell us which of our brand values your nominee has shown through their outstanding service - and if you have a photo of them, send it through too!

Each month's winner will receive a \$200 gift voucher of his or her choice, and go in the draw for the grand prize: a \$2,500 travel credit with Flight Centre.

Nominations for this month are due by **Friday 24 April**.

Highly commended



Hisham Jabbar
Tranzit

Role: InterCity Driver
Values: Customer First, Ahead of the Rest

Hisham was approached by a member of the public during an unscheduled stop and asked to release an unaccompanied minor on board into their custody.

He called for assistance and was advised to keep the child on the bus as this person was not the named contact in

our system. Police were called and eventually the child was delivered to his guardian without further issue.

The child is involved in a custody dispute and his parents were very grateful for Hisham's help.

Hisham stayed calm and professional under considerable pressure in a very emotionally charged situation, and made sure the correct procedures were followed to keep the child safe.

Nominated by Sam Peate

